



SRS

**EFNEP
EVALUATION/REPORTING SYSTEM
STATE LEVEL USER'S GUIDE**

Volume 1: Software User's Manual

Version 4.0

**Expanded Food and Nutrition Education Program
CSREES
United States Department of Agriculture
Washington, DC**

February 1998



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The software system described by this manual was developed for the United States Department of Agriculture (USDA) under Contract Number 53-3159-4-1 by Systems Support Alternatives, Inc.

The software described in this manual was written in Microsoft Access[®] 2.0, a registered product of Microsoft Cooperation. The backup functions included with this software use the *DynaZip[™] Data Compression Toolkit for Microsoft Windows*, a product of Inner Media, Inc. The on-line help was developed under WinHelp Office by Blue Sky Software. WinHelp's screen capture program was used to prepare the screen images displayed in this manual. This manual was prepared with Microsoft Word for Windows 95 (Word 7). Adobe Acrobat[®] was used to prepare the CD-ROM rendition of Volumes 1, 2 and 3 of this User Guide.

Earl O. Merrill
February 1998

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ACKNOWLEDGMENTS FOR ERS VERSION 4

The EFNEP Evaluation/Reporting System, version 4 (ERS4) was developed over the course of nearly four years, and required the assistance and cooperation of many individuals throughout the Cooperative Extension System, at all levels of the organization. Thanks to all who gave input, tested components, reviewed products and provided support for the project during this process. This acknowledgment will highlight some of the key contributors, but many others added in significant ways to the total effort.

ERS4 was built on the foundation of the original system, released in 1993. Please read the acknowledgments for that release, which immediately follow this section, in order to see how the system evolved, and the significant work that went into creating this evaluation software.

After the release of the EFNEP Evaluation/Reporting System (ERS) in 1993, we immediately began looking toward the future. The ES/WIC Nutrition Education Initiative was just starting, and the project directors felt that the ERS could serve as a useful tool for measuring the impacts of that new effort. We also heard from states and territories, who said, “The system is great, but it would be even better if ...” All these new ideas, enhancements, and the occasional “bug” were recorded, and as funds permitted, updates were prepared. The most significant upgrade was released as version 3.3 in October, 1997, which included a greatly expanded and modified foods database, a revised 10 question behavior checklist, and several new reports and enhancements.

During this same time, computer technology advanced rapidly, with the release of Windows-based operating systems and greatly enhanced computing capabilities. So we began to look at a major overhaul of the system, adding in many new features while still maintaining the basic principles of flexibility and ease of use.

Perinatal Module

The project directors for the ES/WIC Nutrition Education Initiative identified various components of pregnancy, birth outcome and infant feeding practices that ultimately formed the cornerstone of the Perinatal module. These new components will greatly strengthen the impact data collected for these vulnerable audiences.

One Day Food Recall

The Western Region EFNEP Coordinators were impressed with a simplified diagnostic report created by Bret Luick, AK. After much discussion, Joda Derrickson, HI led the group in the design of a visually graphic summary that combined Bret’s ideas with other key measures. Proposed formats were put on the Alaska EFNEP Web page for viewing by all states, and with the assistance of Karen Wilken, Colorado, a final version was created that is now included as an optional report.

The New Foods Database

The database incorporated in version 4.0 and 3.3 contains about 160 new foods (bringing the total to 1540 foods) and incorporated hundreds of changes to existing foods. This activity required much patience and dedication on the part of many people, some of whom I would like to recognize here. Alicia Hogbin, working with Ruby Cox, Virginia EFNEP Coordinator, calculated

nutrient values for many of the recipes included in ERIB-3, added other new foods requested by states, corrected errors in the calculation of "other" servings, changed names of products to add consistency and aid in finding the correct food item and corrected nutrient values and weights for many foods. Georgia Lauritzen, Utah EFNEP Coordinator, spent a summer sabbatical in our offices, making further additions and revisions to the foods database, including adding more cuts of chicken and pork, checking out "problem areas" and updating nutrient values and food weights using new USDA data. Sylvia Montgomery helped with the data entry and verification of changes. Many others, including Linda Cook, Florida EFNEP Coordinator carefully reviewed the database, and pointed out potential errors, that were then investigated. The care, attention to detail, and perseverance of many helped to create a greatly improved database that will be used in both version 3.3 and version 4.0. Thanks to all who supported this effort.

Behavior Checklist

Several states were dissatisfied with one or more questions on the Behavior Checklist. A work group was formed to reexamine the domains relevant for EFNEP education, and to propose alternative questions. As a result of this effort, the 15 question checklist was revised to a 10 question checklist. The work group consisted of:

Jean Ann Anliker, MD
Linda Drake, CT
Kathy Daly-Koziel, KY
Jane Voichick and Larry Jones, WI
Muriel Brink and Margaret Day, NY
Judy Heald, Elizabeth Specht and Julie Haines, PA
Ruby Cox and Michael Lambur, VA
Joda Derrickson, HI
Karen Wilken, CO and
Ellen Schuster, MN.

Master Question Database

One outcome of the Behavior Checklist Work Group's activities was the creation of a Master Question Database that would capture all additional questions that States may want to use. The system was designed to allow States to create multiple question sets specifically targeted to the needs of selected target audiences or specific program goals. The following individuals supplied questions for inclusion in the master database:

Kim Greder, IA
Suzanne Murphy, CA
Julie Haines, Judy Heald, PA
Larry Jones, WI
Karil Bialostosky, National Center for Health Statistics, DHHS, and
Diane Linder, LA.

Georgia Lauritzen, UT compiled the Master Question database, and worked with those submitting questions to assure that all information was provided in the correct format and that the scoring was properly calculated. She also initiated the process for getting the documentation about the additional questions for use by future users of the database.

Pilot Test

In the summer and fall of 1996, a dozen states received copies of the ERS 4 system to pilot test. These tests were critical for identifying modifications to the software, operation, manuals and supporting documents. It also became clear that additional training support would be needed to ease the transition and implementation of the system. I want to thank the following for their help during this critical phase of the development:

Elvira Conde and Muriel Brink, NY
BeVerly Sims, AR
Georgia Lauritzen, UT
Larry Jones, WI
Pam Ventris, OK
Jodie Boulton and Sara Wehmas, MN
Robin Orr, IL
Joda Derrickson, HI

and a special thanks to Linda Cook and Nancy Johnson and their counties in Florida for the detailed comments and intensive testing, and to Chris Hanson, Linda Garcia, Marilyn Townsend and the counties in California for the added pilot testing they did as the project neared the end of the development phase.

Training

To provide the essential training support, many alternatives were considered, and ultimately the decision was made to utilize distance education strategies. The number of ERS 4 users is projected to be far greater than for ERS 3, and the train-the-trainer models would be too time-consuming to be effective. Linda Cook and Nancy Johnson, FL developed the training videos and implementation guide, and worked with the programmer to create the sample data set that is used in training sessions.

CD-ROM

At the end of the project, as we were ready to duplicate the software and manuals, we were faced with budget cut-backs. This led to more creative problem solving — how to distribute the system and documentation at the lowest possible cost to the greatest number of users. The use of CD-ROM technology was explored and with the assistance of the contractor, Earl Merrill and Families, 4-H and Nutrition staff Denise Otto, Sylvia Montgomery and Faye Thompson, we were able to convert all the various documents into a form that could go on the CD-ROM.

Other

Carol Ely helped in defining the early “wish list” and components to be incorporated into the system, and tested the first products developed. Sylvia Montgomery provided support to states,

reviewed products, prepared documents and provided invaluable support to the project. Linda Fischer, Contract Officer, helped in negotiating the contract, and developing alternative strategies to keep the project on track. Faye Thompson typed major portions of the volume 3 documents. Karen Konzelmann provided moral support and helpful advice as I solved each of the challenges that arose during the design and development of this software.

And finally, I was very pleased that Earl Merrill was able to stay on this project. He is excellent at translating my “wish list” into reality, often in ways that improve upon the initial idea or request. His creativity, perseverance, and appreciation of the goals of this project have made it a pleasure to work with him.

Wells Willis

National Program Leader, EFNEP

February, 1998

ACKNOWLEDGMENTS FOR ORIGINAL RELEASE, 1993

This new EFNEP Evaluation/Reporting System could not have come about without the hard work and dedication of the National EFNEP Evaluation and Reporting Committee and many others who have served important supporting roles. They devoted many long hours over the past three years to bring this product to completion. All of the members participated in meetings and teleconferences while they carefully deliberated the pros and cons, benefits and burdens of each component part of the program. The aim was to provide the greatest opportunity for enhanced management of EFNEP operations and capture the strengths and successes of EFNEP, while providing flexibility and minimizing reporting burden. This was a heavy responsibility, but I hope you will agree that they did a superb job.

In addition to the design and implementation issues, they also pilot tested the various versions of the software, reviewed and modified the User's Manual, developed supporting documentation and designed sample data collection forms. As a final step, they designed and conducted the regional training sessions, and provided the resources that can aid the training and implementation in the individual States.

For on-going support during design, testing, documentation review, and data collection:

Jean Ann Anliker

Betty Cameron

Linda Cook

Ruby Cox

Joda Derrickson

Virginia Goebel

Micki Horst

Carlene Jordan

Marilyn Townsend.

For development of the dietary analysis portion, including the Foods database and dietary methodology:

Ruby Cox and Joda Derrickson, Team Leaders

Virginia Goebel

Carlene Jordan

Jean Ann Anliker.

For development of the youth component:

Betty Cameron and Marilyn Townsend, Team Leaders

Jean Ann Anliker

Joda Derrickson.

For development of the behavior checklist component:

Micki Horst and Jean Ann Anliker, Team Leaders

Linda Cook

Joda Derrickson

Nancy Hurley (Johnson).

Carlene Jordan provided the County perspective; Virginia Goebel worked on the volunteer portion; and Betty Cameron was the lead for the Interagency Collaboration. Linda Cook, along with Nancy Hurley who became an ex-officio member of the committee, provided many recommendations about the operation of the program, reports to be generated, identification of problems and recommendations for improvement. Jean Ann Anliker and Nancy Hurley worked closely with the programmer during a critical phase of the redesign effort.

As the project progressed, it became clear that we also needed more input from the administrative and policy perspective. Carol Anderson, Ruth Conone and Martha Johnson graciously agreed to join the committee and help address issues, such as sampling and how the data will be used to support the future of EFNEP from the State Leader perspective.

Bart Hewitt, ES, was involved in the early stages of this project, coordinating the initial survey of States and helping summarize the committee's decisions in the initial design phase. Carol Ely, ES, has played a key role in the final stages, following up on many details that need attention, coordinating the revision of the User's Manual and supporting documents. Sylvia Minor (Montgomery) provided support to the committee, arranging conferences, communicating with the committee members, creating the Foods Database using a computer program supplied by the Human Nutrition Information Service, and helping to test the software.

The Behavior Checklist expert panel consisted of:

Michael Lambur, Extension Specialist, Evaluation, Virginia

Steve Carlson, USDA, Food and Nutrition Service

Nancy Ellen Kiernan, Program Evaluation Specialist, Pennsylvania

Mike Young, USDA, Office of Budget and Program Analysis

Connie McKenna, USDA, Extension Service

Jon Weimer, USDA, Economic Research Service

Sid Clemens, USDA, Office of Budget and Program Analysis

Laura Sims, Professor, Human Nutrition and Food Systems, University of Maryland

Juanita Bowens, Graduate Assistant in Virginia EFNEP.

Michael Lambur and Micki Horst set up the procedures for the focus groups. People who conducted or arranged the focus groups included:

Jean Ann Anliker

Linda Cook

Ruby Cox

Marilyn Townsend

Ellen Schuster, University of Minnesota.

Michael Lambur also provided assistance with focus group data and pilot test data analysis along with Ruby Cox. Those who pilot tested the revised EFNEP Behavior Checklist in their States included:

Carol Anderson

Betty Cameron

Ruth Conone

Ruby Cox

Joda Derrickson

Micki Horst

Marilyn Townsend.

Brian Fitzpatrick, System Analyst/Programmer from the University of Kentucky Cooperative Extension Service, conducted beta testing of the State and Federal level systems and the revised Unit level system. He received frequent updates and provided immediate feedback to the programmer, thus helping the project to remain on time and to meet expectations.

Earl Merrill worked tirelessly for many long hours creating a system that brought all the ideas and concepts to a wonderful conclusion. We are indebted to him for his dedication and recognition of the value that this program will have in helping to strengthen the effectiveness of EFNEP.

Finally, I want to thank all of the EFNEP Coordinators and State Leaders who have participated in this effort by taking the time to respond to our surveys and react to the various documents outlining the decisions regarding the dietary analysis, behavior checklist, youth and other components. You helped us identify what was essential, and kept us aware of the need for flexibility. We valued your input and made many adjustments to accommodate the concerns raised. We also valued the work that had gone on previously, and built from the framework of previously existing systems, particularly the Cornell Enhanced EFNEP Reporting System, and the work of the team for the Nutrition Diet and Health Impact Indicators.

And most especially, I want to thank the State Directors for their support of the committee members. You have given them the time and the financial resources and the support to be a part of this effort.

Wells Willis
National Program Leader
EFNEP, USDA-ES
April, 1993
Revised November, 1993

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CONTENTS

ACKNOWLEDGMENTS.....I

 Acknowledgments for ERS Version 4..... i

 Acknowledgments for ERS Version 3..... v

CHAPTER 1 - INTRODUCTION 1

 About EFNEP..... 1

 About the EFNEP Evaluation/Reporting System..... 1

 Levels of Interaction..... 1

 How to Use This Manual..... 2

 What Equipment is Needed..... 3

 What are the Key System Features..... 4

 What Changes Have Occurred Since the Previous Version..... 5

CHAPTER 2 - GETTING STARTED..... 7

 How to Start SRS..... 7

 User IDs and Passwords..... 9

 The SRS Main Switchboard..... 9

 The DataDB and TableDB..... 10

 Initial Data Entry Sequence..... 10

 Screen Styles..... 12

 Record Selector Symbols..... 14

 Printers and Paper..... 15

 The Windows Environment..... 15

 Controls..... 16

 Menu Bars..... 17

 Title Bar..... 19

 Status Bar..... 20

 Some Keyboard and Mouse Tips..... 20

CHAPTER 3 - THE IMPORT STATUS SWITCHBOARD 21

 Import Status Switchboard..... 21

 Import Status File..... 21

 Adding a Unit to the Import Status File..... 23

 Import Status Report..... 23

 Import Summary Data..... 23

CHAPTER 4 - THE REPORTS SWITCHBOARD..... 25

 The Reports Switchboard..... 25

CHAPTER 5 - THE BROWSE SWITCHBOARD..... 27

 The Browse Switchboard..... 27

CHAPTER 6 - THE BEHAVIOR CHECKLIST SWITCHBOARD 29

 About the Additional Behavior Checklist Questions..... 29

 The Behavior Checklist Questions Switchboard..... 29

 Maintaining Question Sets..... 31

CHAPTER 7 - THE SUBGROUPS SWITCHBOARD..... 35

 About the Subgroup Feature..... 35

Subgroups Switchboard	35
Subgroup Codes.....	36
Subgroup Filters	37
Manual Subgroup Revision.....	39
CHAPTER 8 - THE TABLES SWITCHBOARD.....	41
The Tables Switchboard	41
Race Code Table.....	41
About the Foods Database.....	43
Updating the Foods Database.....	44
Food Dictionary.....	46
CHAPTER 9 - THE SYSTEM ADMINISTRATION SWITCHBOARD.....	47
System Administration Switchboard.....	47
DataDBs and TableDBs.....	47
System Configuration	52
Security Functions	53
Update History.....	54
CHAPTER 10 - THE DATA INTERCHANGE SWITCHBOARD	55
Data Interchange Switchboard.....	55
Import Questions	55
Export Sets	55
Import Subgroups and Filters.....	56
Export Subgroups and Filters.....	56
Import Summary Reports.....	56
Export Summary Reports.....	57
Import Version 3 Summary Data	58
Import Foods Database	59
Export Foods Database	59
Export Race Codes	59
Import Race Codes	59
CHAPTER 11 - SRS TOOLS	61
Repair/Compact Database.....	61
Backup.....	62
Restore	63
Backup/Restore Errors.....	64
Install Software Update	64
CHAPTER 12 - INSTALLING THE SRS SYSTEM.....	67
Running SRS Setup.....	67
The Setup Dialogue	68
Problems with the Installation	72
LAN Installation	73
Running SRS on a LAN	74
Important Files.....	74
INDEX.....	75

FIGURES

Figure 1-1. Data Flow between Federal, State, and Unit Systems.....	2
Figure 2-1. SRS Program Group	7
Figure 2-2. Using Start→Programs to Run SRS	8
Figure 2-3. Program Group via ShortCut	8
Figure 2-4. Database Locked at Startup.....	8
Figure 2-5. Alt-Tab to Active SRS	9
Figure 2-6. Logon Screen.....	9
Figure 2-7. SRS Main Switchboard	10
Figure 2-8. Sample Browse Screen.....	13
Figure 2-9. Sample Form Screen.....	13
Figure 2-10. Sample Dialog Box	14
Figure 2-11. Record Selector Symbols.....	14
Figure 2-12. Control Menu	18
Figure 2-13. SRS File Menu.....	18
Figure 2-14. SRS Edit Menu	18
Figure 2-15. SRS Window Menu.....	19
Figure 2-16. SRS Help Menu	19
Figure 2-17. Help About	19
Figure 3-1. Import Status Switchboard.....	21
Figure 3-2. Import Status Browse Screen	22
Figure 3-3. Import Status Edit Screen	22
Figure 3-4. Adding a Unit to the Import Status File.....	23
Figure 4-1. Reports Switchboard	25
Figure 4-2. Sample Report Selection Screen.....	26
Figure 5-1. The Browse Switchboard	27
Figure 5-2. Sample Browse Screen for Adult Summary Data.....	28
Figure 6-1. Behavior Checklist Questions Switchboard	29
Figure 6-2. Browse Screen of Question Sets	31
Figure 6-3. Sample View/Edit Question Set Screen.....	32
Figure 6-4. View/Edit Questions in a Question Set.....	33
Figure 7-1. Subgroups Switchboard.....	35
Figure 7-2. Subgroups Browse Screen	36
Figure 7-3. Build Subgroup Filter Screen	37
Figure 7-4. Edit Participant Profile Filter	38
Figure 7-5. Subgroup Selection	38
Figure 8-1. Tables Switchboard.....	41
Figure 8-2. Race Code Table Browse Screen	42
Figure 8-3. Identification of New Food Item.....	44
Figure 8-4. Foods Database Edit Screen	44
Figure 9-1. System Administration Switchboard	47
Figure 9-2. Attach DataDB and TableDB	48
Figure 9-3. Maintain DataDB and TableDB	49
Figure 9-4. Naming a New DataDB	50
Figure 9-5. Selecting the Location for a New DataDB	50
Figure 9-6. Using File Manager to Create a Directory	51
Figure 9-7. Using Browse to Identify Directory	51
Figure 9-8. Create New DataDB/TableDB Notice.....	52
Figure 9-9. System Configuration Edit Screen.....	52
Figure 9-10. Manage Security	53
Figure 10-1. Data Interchange Switchboard	55

Figure 10-2. Selecting Question Sets to Export..... 56

Figure 10-3. Import Summary Reports 57

Figure 10-4. Export Summary Reports 58

Figure 10-5. Importing Version 3 Summary Data..... 59

Figure 11-1. The SRS Tools Switchboard..... 61

Figure 11-2. Backup DataDB or TableDB 62

Figure 11-3. Restore - Locating the ZIP File..... 63

Figure 11-4. Confirm/Initiate Restore..... 63

Figure 11-5. Install Software Update 64

Figure 11-6. Description of Update from a Zip File 65

Figure 11-7. Start of Update with SETUP.EXE 65

Figure 12-1. Setup Welcome Screen..... 68

Figure 12-2. Supply Destination Location 69

Figure 12-3. New or Existing Data..... 69

Figure 12-4. Overwrite Warning 70

Figure 12-5. Location of Existing DataDB 70

Figure 12-6. Name of Program Group 71

Figure 12-7. Ready to Install 72

Figure 12-8. Installation Complete..... 72

TABLES

Table 1-1. Good and Better Computer Configurations..... 4

Table 1-1. SRS Components and Features..... 4

Table 2-1. Exports Units May Need 11

Table 2-2. Windows System Keys 16

Table 2-3. Graphical Command Buttons 17

Table 3-1. Summary Data Abbreviations..... 21

Table 6-1. Information Needed to Prepare a Question Set..... 31

Table 6-2. Types of Additional Questions..... 32

Table 8-1. Data Fields in the Foods Database 45

Table 8-2. Foods Database Source Codes..... 46

CHAPTER 1 - INTRODUCTION

About EFNEP

The USDA's Cooperative State Research, Education, and Extension Service's Expanded Food and Nutrition Education Program (EFNEP) is a unique program designed to reach limited resource audiences -- especially youth and families with young children. EFNEP operates in all 50 states and in American Samoa, Guam, Micronesia, Northern Marianas, Puerto Rico, and the Virgin Islands. Extension professionals train and supervise paraprofessionals and volunteers who teach food and nutrition information and skills to limited resources families and youth.

The objectives of EFNEP are to assist limited resources families and youth in acquiring the knowledge, skills, attitudes, and changed behaviors necessary for nutritionally sound diets, and to contribute to their personal development and the improvement of the total family diet and nutritional well being.

About the EFNEP Evaluation/Reporting System

This computer system, the EFNEP Evaluation/Reporting System, was developed to capture the positive impacts of the EFNEP. The system provides a variety of reports that are useful for management purposes, provides diagnostic assessments of participant needs, and exports summary data for State and National assessment of the program's impact. The specifications for this system were developed by a committee made up of representatives from across the United States.

The MS-DOS version of this computer system was introduced in the Fall of 1993 and is in use in approximately 1,000 locations covering every state and the U.S. territories. This document describes the Microsoft Windows version of that system. In addition to upgrading from DOS to Windows, a number of new features and capabilities have been added. They are summarized on page 5 (What Changes Have Occurred Since the Previous Version).

Levels of Interaction

The EFNEP Evaluation and Reporting System consists of separate software sub-systems for the Unit, State, and Federal levels. They are denoted as follows:

ERS Unit (County) level subsystem

SRS State level subsystem

FRS Federal level subsystem

Each ERS accumulates data about individuals and exports summary data to the SRS. The SRS accumulates the data from its ERS offices, prepares State summary reports and exports the summary data to FRS. The FRS, in turn, prepares nationwide reports. Also, there is a flow of data from FRS to SRS, and from SRS to ERS.

Figure 1-1 shows the flow of data between these three systems.

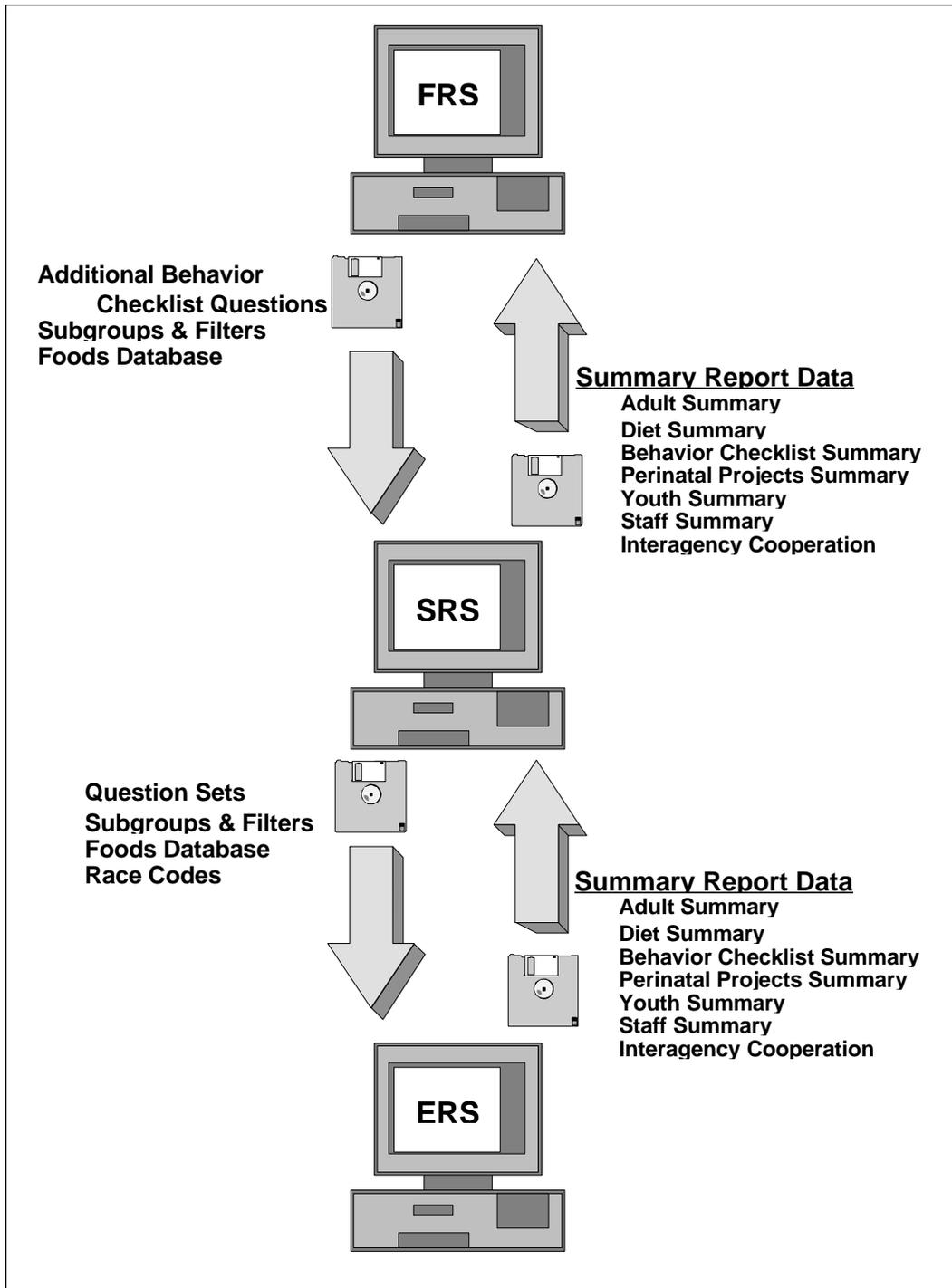


Figure 1-1. Data Flow between Federal, State, and Unit Systems

How to Use This Manual

This manual describes Version 4 of the State Level EFNEP Evaluation/Reporting System. Included is information on the use of the system and the system’s capabilities. The system makes extensive use of on-screen hints to assist the user. Additionally, on-line, context sensitive help is

available to assist the user. This manual, the on-screen hints, and the help system are designed to complement each other. Users of this State level (SRS) system will need some knowledge of the operation of the Unit level (ERS) system.

User documentation of this system is in three separate volumes. This volume, **Volume 1**, guides the operator through installation and use of the software. **Volume 2** contains samples of the reports that may be prepared with this system. **Volume 3** provides background documentation and describes the policies and procedures formulated by USDA headquarters and your State for clarity and consistency in use of the system.

Although this manual concentrates on the operation and use of the software, some information about the strategies that may be used to correctly prepare data for the system is included. The terms SRS and system are used interchangeably.

! *Sample screens and related instructions are for Windows 3.1 and Windows for Workgroups 3.11. The appearance of screens will be slightly different with Windows 95, primarily the system controls on the title bar.*

This volume is organized into 12 chapters. This initial chapter provides a basic overview of the system and its features, and highlights differences from preceding versions.

Chapter 2 shows how to run the system, including the suggested sequence of initial data entry for a new database. It also provides a description of the types of screens used by the system, some symbols used, some basic Windows terms, and some keyboard and mouse tips.

Chapters 3 through 11 describe the components and functions performed by the system, including the SRS Tools application which is described in Chapter 11. Installation of the system is described in Chapter 12.

What Equipment is Needed

The system requires an IBM 386 or compatible desktop, tower model, or laptop personal computer (PC) running Windows, Windows for Workgroups, or Windows 95. All of these operating systems will be referred to as Windows.

Personal Computer Hardware

Like most Windows-based programs, SRS runs more quickly on a faster machine. Microsoft recommends as a minimum a 386SX-based PC with at least 6MB of RAM. Such a PC may operate very slowly, however.

Although SRS will run on almost any computer that runs Windows 3.1 or Windows 95, good and better hardware configurations are presented in Table 1-1. It is best to avoid using computers with less capability than what is listed in the good column.

Table 1-1. Good and Better Computer Configurations

Feature	Good	Better
CPU	Pentium 75 MHz	Pentium 200 MHz
RAM	12 MB	48 MB
Hard Drive (*)	30 MB available	60 MB Available
Windows Version	3.1 or 3.11	95
Laser Printer - speed	6 pages per minute	12 pages per minute

*- If buying a new PC, get at least a 2 GB hard drive

Printing

Most printers supported by Windows may be used. A laser printer is recommended; an ink jet is acceptable but will be slow; dot matrix printers should be avoided.

All reports are designed for printing on 8½ x 11 inch paper. Most reports have portrait orientation; a few have landscape orientation.

All reports are directed to the Windows default printer. Provision is made to select a new default Windows printer from within the system.

What are the Key System Features

The SRS is a database which stores summary information imported from the units within the State. The major components and features are summarized in Table 1-1.

Table 1-1. SRS Components and Features

Component or Feature	Highlights
IMPORT STATUS	Controls import of Adult, Diet, Behavior Checklist, Perinatal, Youth, Staff, and Interagency Cooperation summary data from the specified units.
REPORTS	Prepares Adult, Diet, Behavior Checklist, Perinatal Projects, Youth, Staff, and Interagency Cooperation summary reports from the collected Unit data.
BROWSE	Displays the list of data sets that have been imported.
BEHAVIOR CHECKLIST QUESTIONS	Assembles additional behavior checklist questions into sets for use by the Unit Level systems in the state.
SUBGROUPS	Assigns State level subgroup codes and prepares State level subgroup filters for use by the Unit Level systems in the State.
TABLES	Maintains State versions of the Race Code table and Foods database.
SYSTEM ADMINISTRATION	Maintains DataDB and TableDB, identifies system and reporting period; and manages security.
DATA INTERCHANGE	Imports summary report data from Units in the State, exports State summary data to the Federal level system and imports and exports other data used by the system.

What Changes Have Occurred Since the Previous Version

- The system has been redesigned to operate under Microsoft Windows. A point and click method using the mouse serves to activate various command buttons appearing on the screen. Additionally, the system's data may be accessed over a Local Area Network (LAN). This allows two or more users to operate with the same database at the same time.
- A professional category has been added to the Staff Component.
- All of the import and export features have been regrouped and activated by one top-level switchboard. You can choose to import/export all of the summary report data at once.
- The repair, compact, and backup operations have been consolidated into an auxiliary program accessible through the SRS Tools icon.
- The Perinatal Projects component records information about prenatal care, births, and breastfeeding choices.
- Printing of reports has been streamlined for use with laser printers and a preview option has been built in. The presentation of reports has been designed for easy readability and identification.
- The Subgroups feature allows the forming of subsets of the database by developing filters to select a cross-section of adults who meet these filter criteria.
- The Additional Questions feature expands the information collected about nutritional practices and food handling, by allowing another predetermined set of questions to be used in addition to the base behavior checklist questions.

CHAPTER 2 - GETTING STARTED

This chapter is designed to get you up and running quickly. It shows you how to start the system, and how to take care of and protect the data you enter into the database. It also contains some definitions and helpful information for moving around within the system.

! *This manual assumes you have the general understanding of basic Windows procedures, including how to move between applications and program groups, use the File Manager, and work with a mouse and keyboard. If you require assistance in these areas, please consult the Getting Started with Microsoft Windows manual that came with your Windows package.*

Installation of the software is described in Chapter 12. If Version 4 of SRS is not yet installed on your computer, turn to Chapter 12.

How to Start SRS

Windows 3.1

To start SRS, first locate the SRS Program Group. It should appear something like the one shown in Figure 2-1. Then double click on the SRS icon.



Figure 2-1. SRS Program Group

The SRS icon starts the SRS system. When you double click on it, you will be prompted to enter your user ID and password. See **User IDs and Passwords** later in this chapter. Once you are logged on, the SRS Main Switchboard, Figure 2-7, will appear.

The SRS Tools icon starts the SRS Tools application, which provides database repair/compact, backup/restore and software update functions. The SRS Tools functions are described in Chapter 11.

The SRS Help icon provides direct access to the on-line help without actually running the system. When in SRS, press the F1 key to bring up SRS Help. The SRS Help supplements the information in this manual.

The DOS ScanDisk icon provides convenient access to ScanDisk. Run ScanDisk immediately after a crash to correct any problems with the hard drive. Note that when you run ScanDisk under Windows, it will not be able to correct any problems. If ScanDisk reports errors, you will need to Exit Windows and run ScanDisk again directly from DOS.

! *If ScanDisk is not available on your computer (DOS versions earlier than 6.20) then you will need to shut down Windows and run CHKDSK /F from the DOS prompt.*

Windows 95

There are two ways to run SRS under Windows 95.

One way is to click Start→Programs, select the SRS program group, then the item to run.



Figure 2-2. Using Start→Programs to Run SRS

The other way is to use the short cut placed on your desktop by Setup. Double clicking it opens the SRS program group shown in Figure 2-3.



Figure 2-3. Program Group via ShortCut

All the Figure 2-3 icons function as described above for Windows 3.1, except ScanDisk which is fully functional under Windows 95.

Database Locked Error

If you get the following error after entering your ID and password, you have probably started a second copy of SRS. This can happen if you minimize SRS and then start it again. Sometimes, triple clicking the SRS icon will be interpreted by Windows as two double clicks which causes SRS to start a second time.



Figure 2-4. Database Locked at Startup

If this happens, click OK to close the startup. Then, hold down the Alt key and press Tab until the following appears:



Figure 2-5. Alt-Tab to Active SRS

The name of the current SRS screen is shown in the square brackets.

If this does not solve the problem, close Windows, re-boot the computer and try again.

User IDs and Passwords

Logging on to SRS requires a User ID (Name) and password. The Logon screen is shown in Figure 2-6. Use the Security Functions described in Chapter 9 to assign new IDs, remove users, and change passwords.

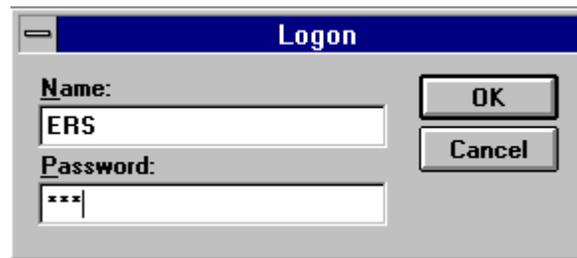


Figure 2-6. Logon Screen

After typing the logon name (user ID), press the tab key to move to the password field. After entering the password, you can press the Enter key or click the OK button.

! *When the system is first installed, you must log on using ERS as both your user ID and password. Remember, passwords are case sensitive, the initial password, **ERS**, must be entered in all caps.*

The security features provide a safeguard against unauthorized modification of the data. See Volume 3 for additional guidance on use of user IDs and passwords.

The SRS Main Switchboard

The SRS Main Switchboard, Figure 2-7, is the main menu for the system. Use the SRS Main Switchboard to access the various components and functions of the system, and to close the system and return to Windows. The Main Switchboard also displays the unit ID, the names and locations of the DataDB and TableDB, today's date, reporting period, and user ID. The functions of the buttons on this switchboard are described in chapters 3 through 10. Use the Tools button to close SRS and open SRS Tools. Once in Tools, you will need to exit to Windows to reenter SRS.



Always, verify that you are using the correct DataDB and TableDB. If not, click the System Administration switchboard to attach the correct ones. It's also a good idea to check the date to make sure the computer clock is correct.

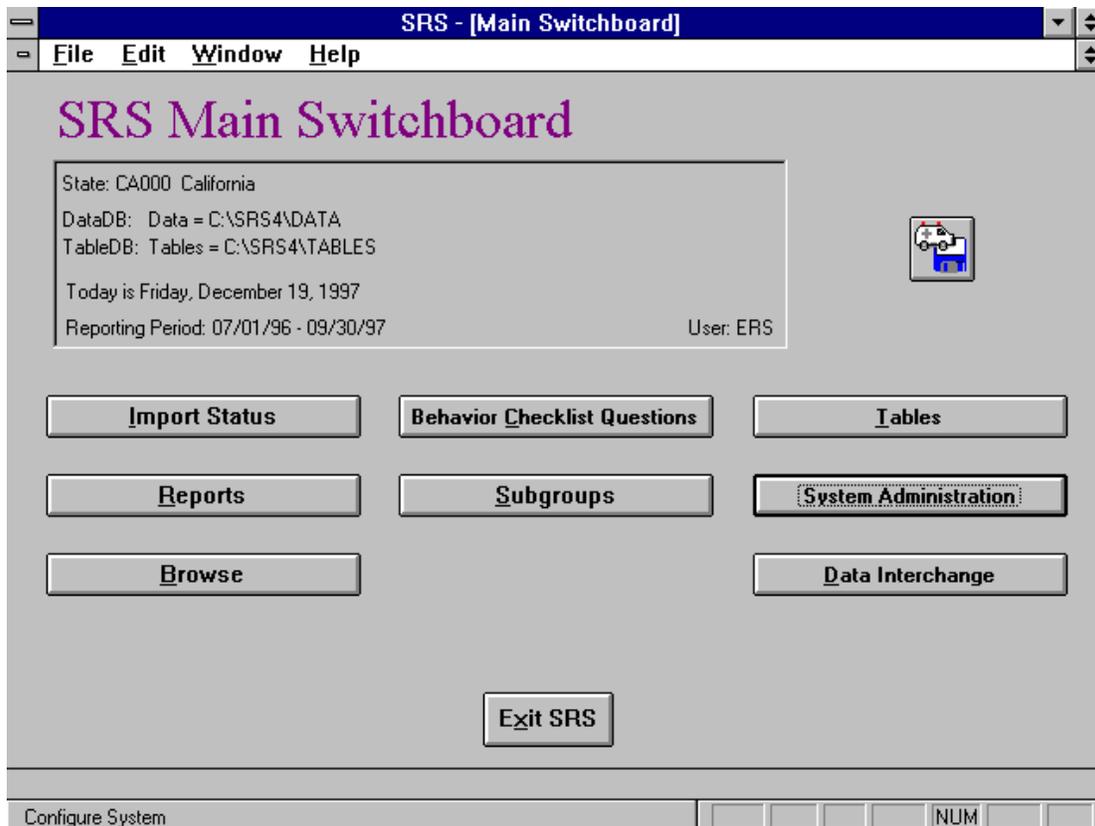


Figure 2-7. SRS Main Switchboard

The DataDB and TableDB

The system keeps the data in two databases called DataDB and TableDB. The DataDB contains the summary data for adults, youth, staff, etc. The TableDB contains the Foods Database and Race Codes. Usually you will have one DataDB and one TableDB for each fiscal year.

The DataDBs and TableDBs are named. The initial ones will be named DATA and TABLES, respectively. Assuming you installed the system in the default directory, DATA will be located at C:\SRS4\DATA, and TABLES will be located at C:\SRS4\TABLES

The initial DataDB will be empty. The following section suggests how to get the system loaded with data.

Initial Data Entry Sequence

If you are starting with a new, empty database, enter the data in the following progression:

Enter System Configuration Information

Enter the Unit ID, name, and the reporting period.

The System Configuration information is described in Chapter 9.

Import the Summary Data

Use the Data Interchange component to import summary data from the units in your State. If you are importing Version 3.x data you will need to supply the unit's name. If you are importing Version 4 data, the name of the unit is included with the import.

See the following chapters:

- Import Status - Chapter 3
- Data Interchange - Chapter 10

Optional Checklist Questions

If you are using the additional behavior checklist questions feature, use the Data Interchange component to import the latest question master file from the Federal level. Then prepare the question set(s) for exporting to your units.

See the following chapters:

- Behavior Checklist - Chapter 6
- Data Interchange - Chapter 10

Subgroups

If you are using State subgroups or State subgroup filters, enter them and prepare the export for use by the units in your state.

See the following chapters:

- Subgroups - Chapter 7
- Data Interchange - Chapter 10

Export to Units

You must prepare exports for the units in your state to get them up and running under ERS 4. The Table 2-1 describes the exports you may need to prepare. In most cases, they will all fit on a single diskette.

Table 2-1. Exports Units May Need

Export	Description
FOODS.DBF	If your State uses State-specific food items, you will need to distribute the revised FOODS.DBF to the units in your State.
Question Sets	If your State uses the additional Behavior Checklist questions, you will need to distribute the questions and your question set(s) to your units.
RACES.DBF	If your state uses racial/ethnic subcodes you will need to distribute your State's race code table to your units. The Race Code table distributed with ERS 4 contains only the 5 base codes. The Race Code table distributed with SRS 4 contains the suggested subcodes, if subcodes are used.
Subgroups	If your State uses state-level subgroups or subgroup filters, you will need to distribute them to your units.

All units in your State should use the same Foods database, Question Sets, Race Codes, and Subgroup codes and filters.

Screen Styles

The system uses four styles of screens: Switchboard, Browse, Form, and Dialog Box. Switchboards are used to switch to a different part of the system. Browse screens are used to select the item of data to use, and Form screens are used to view, add or edit the selected data. Dialog boxes are popup screens containing a request for important information or to display an error message.

! *The term screen is used interchangeably with the term window. Switchboards, browse screens, forms screens, and dialog boxes are all windows in the Microsoft parlance.*

Switchboards

Switchboards are screens of command buttons. Click one of the buttons to perform the operation indicated by the button. Switchboards are like menus. The term switchboard is used instead of menu to distinguish from the Menu Bar that is at the upper left corner of the screen. The SRS Main Switchboard, Figure 2-7, is an example of a switchboard.

For buttons with an underlined letter in their caption, pressing the Alt key and the underlined letter has the same effect as a mouse click. Also, tabbing to a button and pressing the Enter key or the Space Bar will activate the button.

Browse Screens

Browse screens present a list of information in a table. They provide a quick way to review the contents of the table and to position to the desired entry. Figure 2-8 shows a sample browse screen.

The current row is indicated by the small triangle shaped arrow at the left edge of the row. Also, the lower left area of the screen shows the current record number and the total number of records in the table.

There are a number of ways to move about the rows in a browse screen. Here are the more popular ones:

- Use Page Up and Page Down to move a screen at a time.
- Use the vertical scroll bar along the right edge of the screen.
- On screens with a Locator box, enter a value and press Enter to position to the record nearest the value entered. The Locator searches the leftmost data column on the browse screen.

See help topic Navigation Keys in the on-line help for other hints on moving about screens.

The screenshot shows the 'SRS - [Import Status by ID]' window. It features a menu bar (File, Edit, Window, Help) and a toolbar with a search icon and an 'Add Unit' button. Below the toolbar is a 'Locate Unit ID:' text box. The main area contains a table with the following data:

Unit ID	Unit Name	A	D	C	P	Y	S	I		
CA001	ALAMEDA	X	X			X	X	X	...	X
CA007	Butte	X	X				X	X	...	X
CA013	Contra Costa	X	X				X	X	...	X
CA019	Fresno	X	X			X	X	X	...	X
CA029	Kern	X	X			X	X	X	...	X
CA037	Los Angeles	X	X			X	X	X	...	X
CA059	Orange	X	X			X	X	X	...	X
CA065	Riverside	X	X			X	X	X	...	X
CA067	Sacramento	X	X			X	X	X	...	X
CA071	San Bernardino	X	X			X	X	X	...	X
CA073	San Diego	X	X			X	X	X	...	X
CA075	San Francisco								...	X
CA077	San Joaquin	X	X				X	X	...	X
CA081	San Mateo								...	X
CA085	Santa Clara	X	X			X	X	X	...	X
CA099	Stanislaus	X	X				X	X	...	X
CA107	Tulare	X	X				X	X	...	X

At the bottom, there is a status bar showing 'Record: 3 of 17' and 'Form View'.

Figure 2-8. Sample Browse Screen

Form Screens

Form screens are used to view or enter data. Figure 2-9 shows a sample form screen.

The screenshot shows the 'SRS - [Edit Food Item]' window. It features a menu bar (File, Edit, Window, Help) and a date field (01-Oct-97). The main area contains a form for editing food item details:

Food ID: 791
 Food Name: MUFFINS, BRAN,(INCL W/ RAISNS&NUTS)
 Name of Unit: MUFFIN
 Grams/Unit: 33
 Serving Size: 1.00

Meat Serving: 0.00
 Dairy/Calcium Servings: 0.00
 Vegetable Servings: 0.00
 Bread Servings: 1.00
 Fruit Servings: 0.25
 Other: 1.00

Calories: 83
 Protein (g): 3.1
 Fat (g): 3.3
 Carbohydrates (g): 13.0
 Fiber (g): 3.6
 Alcohol (g): 0.0

Vitamin A (RE): 14
 Vitamin C (mg): 0
 Calcium (mg): 76
 Iron (mg): 1.5
 Vitamin B6 (mg): 0.05

Source: A

Buttons: Cancel, Save

Bottom status bar: Name of food item (up to 40 positions) | FLTR | NUM

Figure 2-9. Sample Form Screen

When you enter a change, a pencil symbol will appear in the record selector area, which is along the left of the screen. The pencil indicates a change has not yet been saved. To undo the change, press Esc. All changes are automatically saved when the screen is closed, unless the screen was closed with a Cancel button. Using File→Close or the Windows 95 X button to close a screen may or may not save the changes, so use those methods to close screens with unsaved changes with caution. See **Record Selector Symbols** later in this chapter for a description of the symbols that may appear in the record selector area.



Dialogs and Message Boxes

Dialogs and Message Boxes are popup screens. They may prompt you for a decision, ask you to confirm an action, or notify you that a process has completed. Error messages are in the form of dialog boxes. The dialog must be answered before any other action is permitted. Figure 2-10 is a dialog box requesting you to point to the location of a file named CKQSET40.MDB.

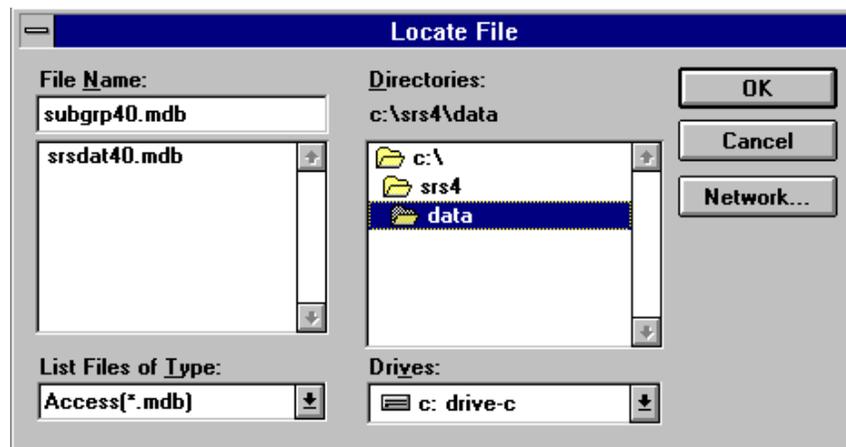


Figure 2-10. Sample Dialog Box

Record Selector Symbols

Microsoft Access places symbols in the record selector area to convey information about the status of the form or its underlying data record. The record selector is displayed along the left side of the screen. The symbols and their meanings are shown in Figure 2-11.

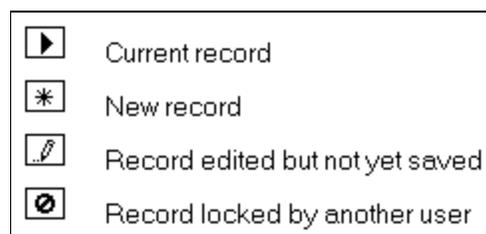


Figure 2-11. Record Selector Symbols

On Browse screens, the Current Record symbol indicates which row is current. The New Record symbol will not appear due to the controlled way the system adds new records. The pencil symbol indicates a change has not yet been saved. Clicking the Save or Close button will

automatically save the change. Clicking the Cancel button, if present, will undo the change and close the screen. The Record Locked symbol indicates the current record is locked by another user. This happens when the other user is saving changes.

Printers and Paper

The system works best with laser printers. Most Ink Jet printers are O.K., but slower. You may incur problems with dot matrix printers.

All reports are designed for printing on 8½ x 11 inch paper. Most reports have portrait orientation; some have landscape orientation.

All reports are directed to the Windows default printer. You may select a new default printer from the Default Printer menu item under File on the Menu Bar (ALT-F,D).

If you are using Windows 3.1 or Windows for Workgroups, you will need to use Print Manager to resolve out of paper, printer not ready conditions and other printer problems. With Windows 95, use the Printers folder under My Computer to resolve printer problems.

The Windows Environment

The system is designed to work with Windows 3.1, Windows for Workgroups 3.11, and Windows 95. While hints for each operating system may be provided, the document focus is for Windows 3.1.

Some Windows navigation keys are listed in Table 2-2. They apply to all windows applications. The remainder of this chapter presents some important Windows information and describes some terminology used by this system.

Table 2-2. Windows System Keys

Press	To
F1	Display the Help contents. If the Help window is already open, pressing F1 displays the contents for How To Use Help.
CTRL+ESC	Switch to the Task list.
ALT+ESC	Switch to the next application, whether it is running in a window or running as an icon.
ATL+TAB	Switch to the application you last used. Or switch to the next application, by pressing and holding down ALT while repeatedly pressing TAB. To return to your original application, keep holding down the ALT key, and press ESC.
SHIFT+ALT+TAB	Switch to previous applications by pressing and holding down ALT+SHIFT while repeated pressing TAB. To return to your original application keep holding down the ALT key, and press ESC.
PRINT SCREEN	Copy an image of the screen onto the Clipboard.
ALT+F4	Quit an application or close a window.
CTRL+F4	Close the active group window or document window.

Controls

Controls are graphical objects placed on screens to display or accept information. The standard controls are described below. Windows will highlight the current control so you can tell which one is selected. To select a different control, tab to it, or click its label.

Label

Labels are text used as a label or description of another control.

Text Boxes

Text boxes display and accept text or numeric data. If the text box has a white background, you may enter data into it. If it has a gray background, it is locked and you may not type in it.

Option Group

A group of options, represented by option buttons or check boxes, is enclosed in a border. Only one option at a time may be selected.

Check Boxes and Toggle Buttons

Check boxes and toggle buttons represent Yes/No, True/False, or On/Off values. Clicking the label of the check box or toggle button will select the opposite value. Also, pressing the space bar while the check box or toggle button is selected will toggle its value.

Combo Box (Drop-Down List)

A combo box is a combination text box and list box. You may enter data directly or pick from the drop down list.

List Box

A list box displays a list of items for you to select. It does not allow for user input. Use the mouse to click the item to be selected.

Subform

A subform is simply a form embedded on a main form.

Command Button

Command buttons perform some action when clicked. Command buttons may have a text caption such as “Close”, or have a graphical representation such as . Table 2-3 describes the graphical command buttons used by the system. Command buttons with a red caption may be activated by pressing the Esc key.

Table 2-3. Graphical Command Buttons

Button	Name	Action
	Explode	Shows an exploded view of the data on the row. Usually this opens a view/edit form screen.
	Delete	Deletes the record from the database.
	Printer	Print or preview a report for the current record.
	Calendar	Use the calendar popup to select the date for the date field to the immediate left of the button.
	Exit (Exit Door)	Close the current screen and return to the previous one. On most screens, pressing the Esc key will activate the Exit Door button.
	Print Preview	Displays the report on the screen. Press F1 while previewing a report for the zoom and navigation keys available to move about the report.
	Print	Prints the requested report on the default printer.

Menu Bars

The Windows environment organizes commands in categories which are displayed in a horizontal bar, the menu bar, at the top of the screen. The SRS system provides four menus: File, Edit, Windows, and Help. Clicking on the menu will pull down a list of commands associated with that menu. Available commands are shown in black text. If the command cannot be used at this time it will be grayed out. The menu also indicates keyboard entries which correspond to the available commands.

The Control Menu

The control menu, Figure 2-12, is an expansion of the gray button at the left of the menu bar. It controls the size and position of the screen.

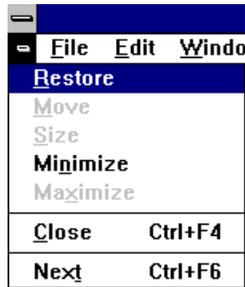


Figure 2-12. Control Menu

The File Menu

The File menu allows you to print the screen you are working with. This menu allows selection of a different printer as the default printer for printing reports. Use the Emergency Close if the normal exit button does not work. Figure 2-13 shows the File menu.

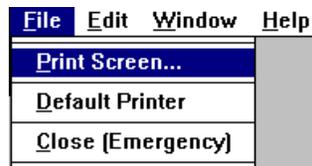


Figure 2-13. SRS File Menu

The Edit Menu

The Edit menu, shown in Figure 2-14, allows you to copy or cut highlighted data from a text box to the Windows clipboard. Paste copies the contents of the clipboard to the current control - which also should be a text box.

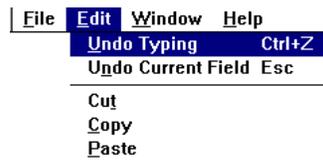


Figure 2-14. SRS Edit Menu

The Window Menu

The Window menu, Figure 2-15, identifies the active window, and controls the arrangement and size of the open screens.

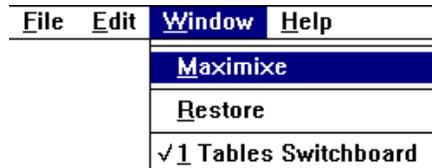


Figure 2-15. SRS Window Menu

The Help Menu

The Help menu provides context-sensitive help to aid in selecting what action to take, or the proper code or data to enter. The Help system contains both a top-level table of contents and individual topics which may be searched alphabetically. The Help system can also be activated by pressing the *F1* function key. The Help on Help choice will bring up the Windows Help on Help system. Figure 2-16 shows the help menu and Figure 2-17 shows the Help About Dialog Box.

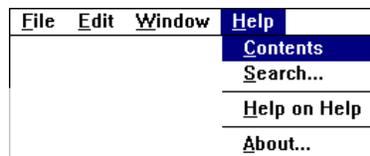


Figure 2-16. SRS Help Menu



Figure 2-17. Help About

Title Bar

The Title Bar is a colored text banner appearing along the top of the screen. The caption in the title bar is the “name” of the screen.

Status Bar

The Status Bar is a text box at the bottom of the screen which often contains information about the current control or the status of the current activity. For prolonged operations, the status bar may contain a Status Meter which is a gauge of the activity's percent of completion. In some cases, there is no specific additional information and the status bar contains the Microsoft Access default of "Form View."

Some Keyboard and Mouse Tips

There are a number of short cuts you can use to minimize the number of mouse clicks and keystrokes. In many cases, you can use the mouse or the keyboard to accomplish the same thing. Which you use will depend on your preferences and where your hands are. If you have the mouse in hand, you will probably want to continue using the mouse until you need to release it to type some information. While your hands are on the keyboard, you may want to use keyboard short cuts to avoid reaching for the mouse.

1. When a button is selected (highlighted), pressing the space bar or the Enter key is like clicking the button.
2. When the caption for a button has an underlined letter or number, holding down the Alt key and pressing the letter or number is like clicking the button.
3. When the label of a text box contains an underlined letter or number, holding down the Alt key and pressing the letter or number has the same effect as tabbing to the text box.
4. With many text boxes (data entry fields), clicking on the label will select the text box.
5. When characters in a text box are highlighted, pressing a character key will delete the highlighted text and replace it with the new typing.
6. Dragging the mouse from right to left across a text box is a quick way to highlight the text in the text box.

For more information, visit the following topics in the on-line help:

- Editing Keys
- Navigation Keys
- Shorthand Keys for Data Entry

CHAPTER 3 - THE IMPORT STATUS SWITCHBOARD

Import Status Switchboard

The Import Status component is used to manage the imports of summary report data from the units in your State. The Import Status Switchboard is shown in Figure 3-1.

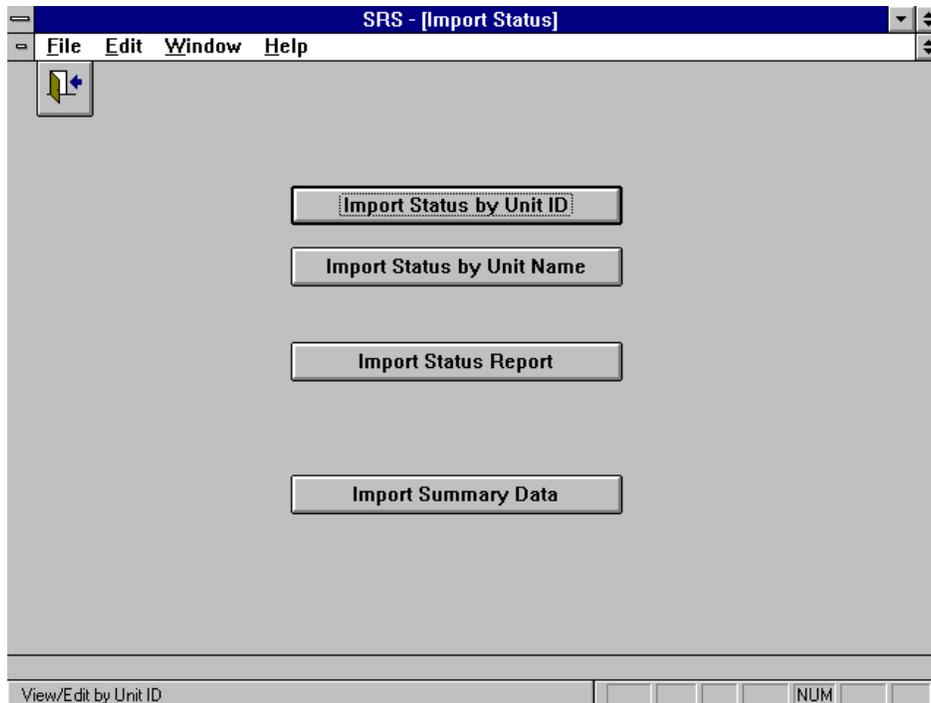


Figure 3-1. Import Status Switchboard

Import Status File

The Import Status file contains the import status by Unit ID and data component. The abbreviations listed in Table 3-1 are used to identify the summary data component.

Table 3-1. Summary Data Abbreviations

A	Adult Profile Summary
D	Diet Summary
C	Behavior Checklist Summary
P	Perinatal Project Summary
Y	Youth Summary
S	Staff Summary
I	Interagency Cooperation

The Import Status file may be accessed by Unit ID or by Unit Name. Figure 3-2 shows the Import Status by Unit Name screen.

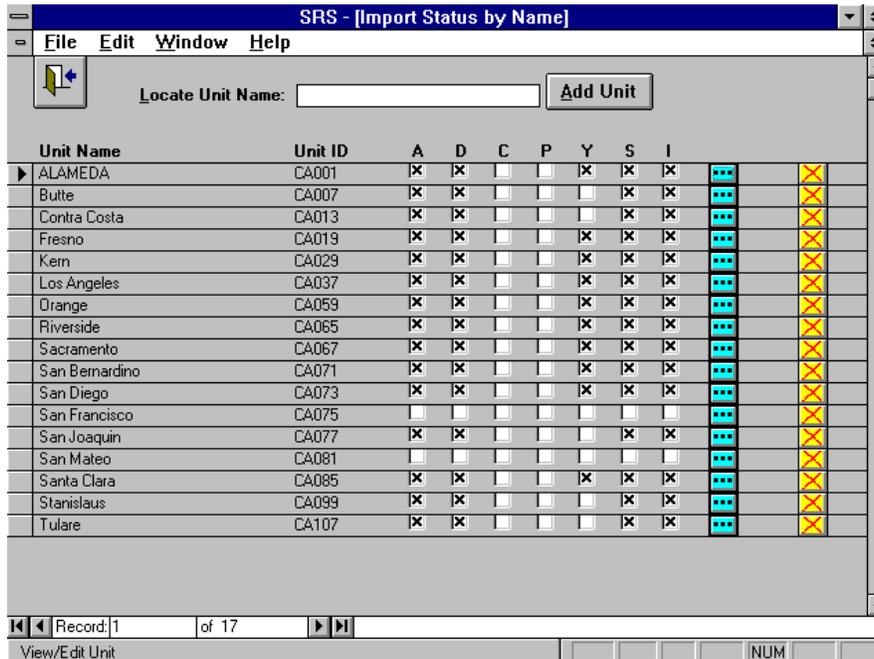


Figure 3-2. Import Status Browse Screen

The Import Status Edit screen, Figure 3-3, may be used to enter or change the name of a unit. It also provides the date and time the unit prepared the export.

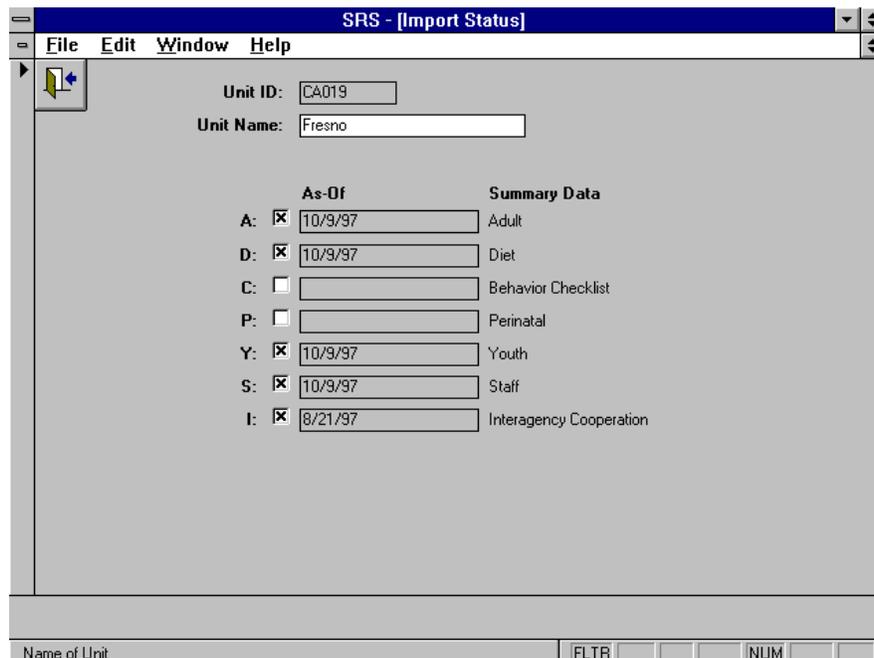


Figure 3-3. Import Status Edit Screen

Adding a Unit to the Import Status File

You may wish to add all units in your state to the Import Status file before starting the imports. This allows you to easily determine which ones are missing. Figure 3-4 provides an example.

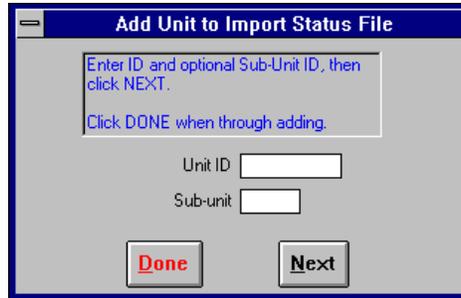
The image shows a software dialog box titled "Add Unit to Import Status File". Inside the dialog, there is a text box containing the instructions: "Enter ID and optional Sub-Unit ID, then click NEXT." and "Click DONE when through adding." Below the text box, there are two input fields: "Unit ID" and "Sub-unit". At the bottom of the dialog, there are two buttons: "Done" and "Next".

Figure 3-4. Adding a Unit to the Import Status File

Import Status Report

The Import Status Report lists the contents of the Import Status file by Unit ID. It also contains a tally by summary data component. Thus, it provides a check of the completeness of the data imported from the units. The report may be printed or previewed on screen.

Import Summary Data

Importing the summary data is described in Chapter 10.

CHAPTER 4 - THE REPORTS SWITCHBOARD

The Reports Switchboard

The Reports Switchboard, Figure 4-1, is used to prepare State level summary reports based on the imported summary data.

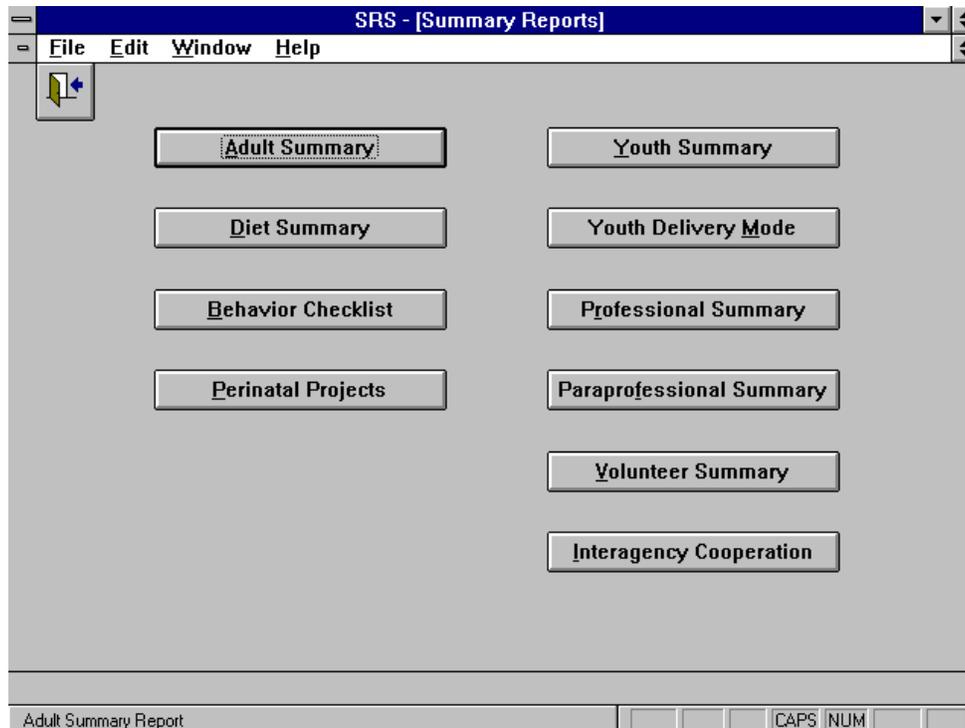


Figure 4-1. Reports Switchboard

For each summary report, you may elect to prepare the report for one unit or for all units together. For adult data, including nutrition, behavior checklist, and perinatal projects, you can prepare a report for each subgroup filter that was in effect when the unit prepared the export. Figure 4-2 shows a sample report selection screen.



The subgroup filters used here are based on the ones that were in the unit's database at the time the export was prepared.

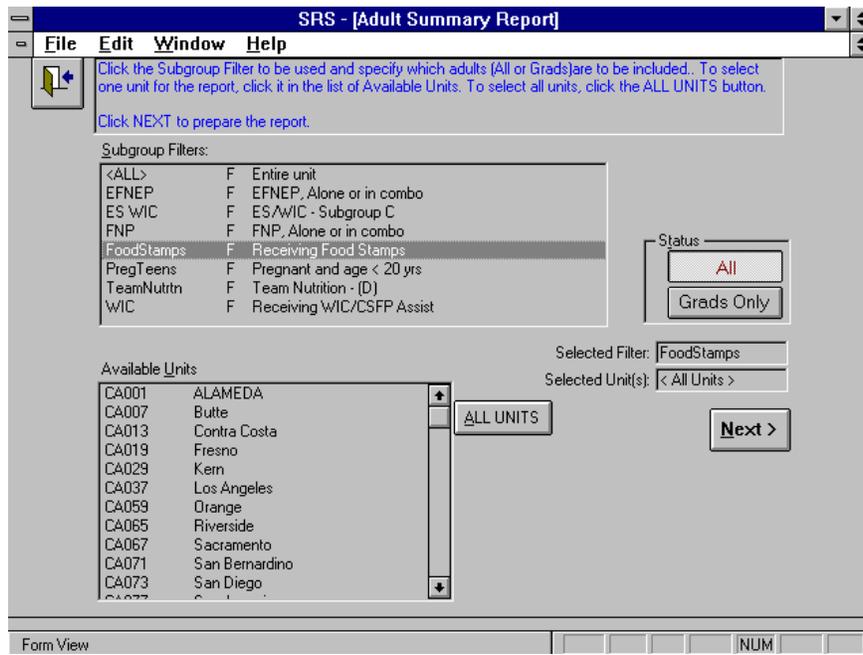


Figure 4-2. Sample Report Selection Screen

CHAPTER 5 - THE BROWSE SWITCHBOARD

The Browse Switchboard

The Browse component allows for perusal of the imported summary data. This supplements the information in the Import Status file. The Browse Summary Data Switchboard is shown in Figure 5-1.

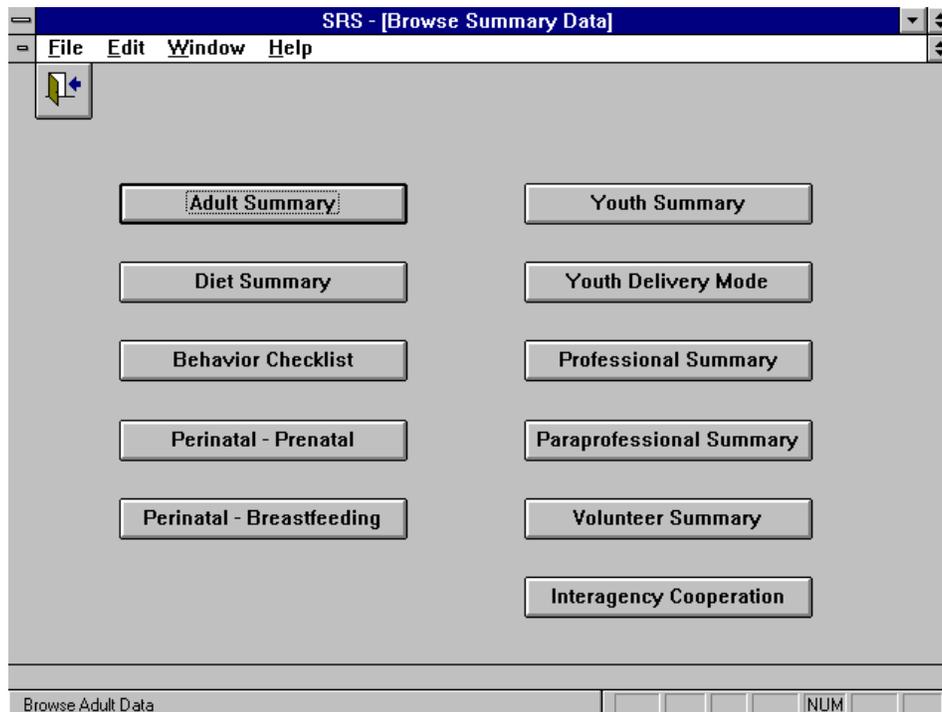


Figure 5-1. The Browse Switchboard

Each item selected will display a listing of the units, filters used, report period, and date the export was prepared. Some data counts are included to aid in the review, as shown in Figure 5-2.

Unit ID	Filter	Begin	End	AS OF	#Adults	
CA001	<ALL>	7/1/96	6/30/97	10/9/97 1:52:13 PM	649	✖
CA001	EFNEP	7/1/96	6/30/97	10/9/97 1:52:43 PM	649	✖
CA001	FoodStamps	7/1/96	6/30/97	10/9/97 1:53:11 PM	361	✖
CA001	PregTeens	7/1/96	6/30/97	10/9/97 1:53:22 PM	37	✖
CA001	WIC	7/1/96	6/30/97	10/9/97 1:53:31 PM	210	✖
CA007	<ALL>	7/1/96	6/30/97	10/9/97	449	✖
CA013	<ALL>	7/1/96	6/30/97	10/9/97 1:59:57 PM	300	✖
CA013	EFNEP	7/1/96	6/30/97	10/9/97 2:00:12 PM	300	✖
CA013	FoodStamps	7/1/96	6/30/97	10/9/97 2:00:27 PM	139	✖
CA013	PregTeens	7/1/96	6/30/97	10/9/97 2:00:33 PM	42	✖
CA013	WIC	7/1/96	6/30/97	10/9/97 2:00:42 PM	142	✖
CA019	<ALL>	7/1/96	6/30/97	10/9/97	989	✖
CA029	<ALL>	7/1/96	6/30/97	10/8/97	596	✖
CA037	<ALL>	7/1/96	6/30/97	10/9/97	1821	✖
CA059	<ALL>	7/1/96	6/30/97	10/9/97	1088	✖
CA065	<ALL>	7/1/96	6/30/97	10/9/97	746	✖
CA067	<ALL>	7/1/96	6/30/97	10/9/97	653	✖
CA071	<ALL>	7/1/96	6/30/97	10/9/97	730	✖
CA073	<ALL>	7/1/96	6/30/97	10/9/97	2054	✖
CA077	<ALL>	7/1/96	6/30/97	10/9/97	392	✖
CA085	<ALL>	7/1/96	6/30/97	10/9/97	558	✖

Figure 5-2. Sample Browse Screen for Adult Summary Data

! *The delete button applies to all rows on the screen for the unit, since the data is maintained at the unit-component level, not at the filter level. That is, deleting one row for a unit causes all rows for that unit to be deleted.*

Note that data imported from units using ERS 4 have filters other than <ALL> and an AS OF with time in addition to date. Data imported from units using ERS 3 have only the <ALL> filter, since they can export only data representing the entire unit.

CHAPTER 6 - THE BEHAVIOR CHECKLIST SWITCHBOARD

About the Additional Behavior Checklist Questions

The Additional Behavior Checklist Questions are questions that may be asked of participants in addition to the Base Behavior Checklist Questions.

The additional questions are prepared at the Federal level using questions submitted by the States. This Question Master File is then exported to the State system where they are grouped into one or more Question Sets. The State system then exports the questions and question sets to its Unit level systems where they are used to collect entry and exit responses from participating adults. The Behavior Checklist Summary Report includes the results of the responses to the base and additional questions.

The Behavior Checklist Questions Switchboard

The Behavior Checklist Questions Switchboard, Figure 6-1, is used to manage the additional behavior checklist questions feature. At the State level, the primary function is to assemble the questions imported from the Federal level system into one or more sets of questions and export them for use by the Unit level systems in the State.

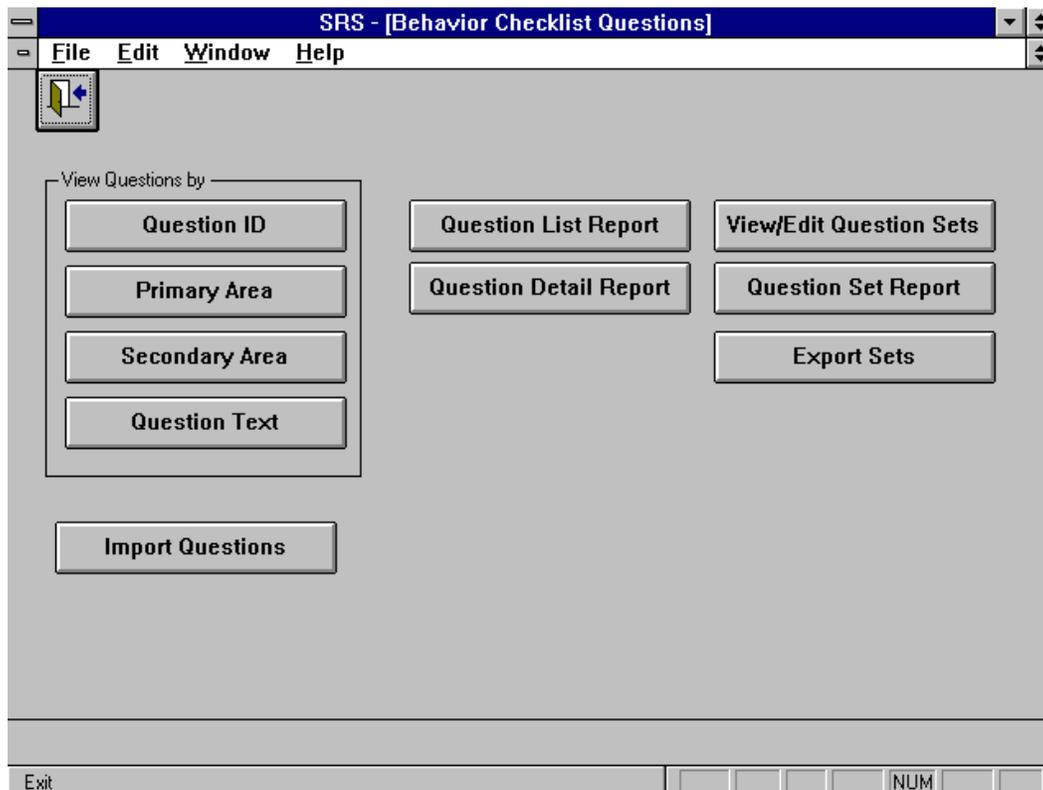


Figure 6-1. Behavior Checklist Questions Switchboard

Following is a brief description of the command buttons on the Behavior Checklist Questions switchboard.

Question ID

This function is used to access questions by ID number. For questions submitted by states, the state abbreviation appears as the first two letters of the ID.

Primary Area

This function is used to access questions by Primary Area addressed, such as Food Resource Management, Nutrition Practices, or Food Safety. See Volume 3 for a list of codes for primary and secondary areas.

Secondary Area

This function is used to access questions by Secondary Area addressed. Some questions may relate to more than one area, for example, Nutrition Practices and Food Resource Management.

Question Text

This function is used to access questions based on the text of the question. This may aid in identifying similar questions.

Question List Report

This function provides a single line per question of all questions in the database. The list may be sorted by Question ID, Primary Area, Secondary Area, or Question Text.

Question Detail Report

This report provides the detailed information about each question. The report is formatted so two questions fit on a page. To print the detail information for a specific question, use the print icon on one of the **View Questions by** buttons.

View/Edit Question Sets

This function provides access to the question sets developed for your state. You may add, delete, and revise question sets.

Question Set Report

This function provides a list of the question sets and the specific questions in each set.

Import Questions

Importing questions is described in Chapter 10.

Export Sets

Exporting question sets is described in Chapter 10.

Maintaining Question Sets

Click the View/Edit Question Sets button on the Behavior Checklist Questions switchboard to open the Question Sets by ID browse screen shown in Figure 6-2. Use it to view/edit an existing set or to add a new one.



Figure 6-2. Browse Screen of Question Sets

Before attempting to add a question set or to modify an existing one, you should be familiar with the questions in the Question Master File and know which questions best meet your objectives. The information you need to have available to prepare a question set is listed in Table 6-1.

Table 6-1. Information Needed to Prepare a Question Set

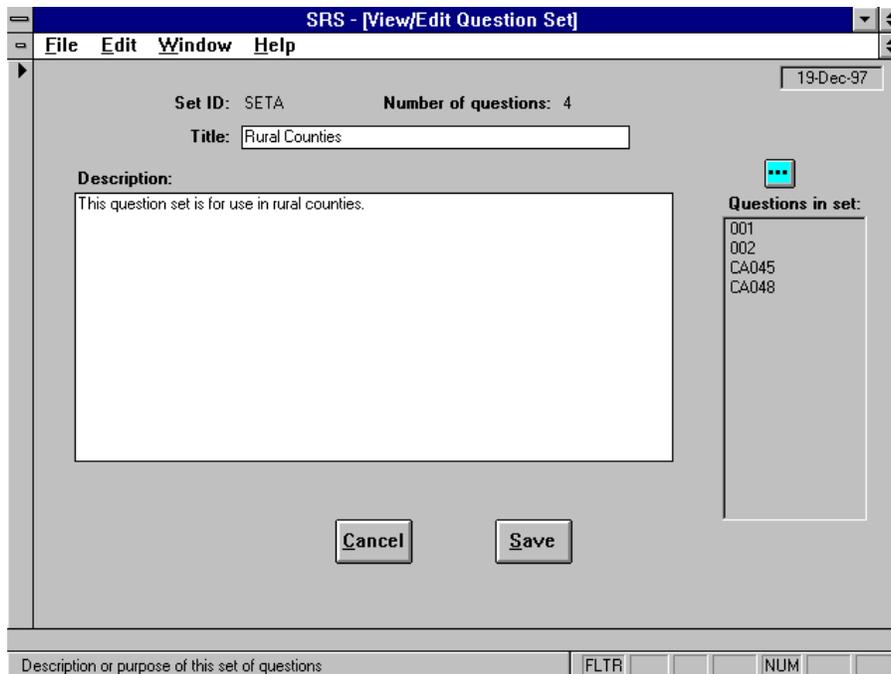
Set ID	A name for the set of questions. The set ID may be up to 8 characters long.
Title	Set Titles may be up to 60 characters long.
Set Description	The set description is free form text that may be used to describe the purpose of the set, guidelines for using its questions, etc. Remember you can use the Ctrl-Enter key to start a new line within this large text box.
List of Questions	You may pick up to 15 questions to be in the set.
Question Order	Initially questions will appear in the order you select them. You can change this order later. The question order determines the order they appear on the data entry screen in the ERS system. This should agree with the order of the questions on the hard copy questionnaire used to collect the data.

Questions are classified by the type of response they require. This may influence the questions you choose. Table 6-2 lists the four types of questions that may be available for use.

Table 6-2. Types of Additional Questions

Code	Type	Description
4	4-Choice	Responses are coded on a 1 to 4 scale.
5	5-Choice	Responses are coded on a 1 to 5 scale.
L	Logical	Responses are 1 for yes and 2 for no.
N	Numeric	Responses are numeric. Each question has its own range of response values.

Figure 6-3 shows the View/Edit Question Set screen used to describe the question set and to choose its questions. The question title is used to identify the purpose of the set. The description field may be used to provide additional information about the set, including guidelines for using the questions.

**Figure 6-3. Sample View/Edit Question Set Screen**

Note the explode button in Figure 6-3 located just above the list of questions in the set. Clicking it opens the View/Edit Questions in Set screen shown in Figure 6-4. Use the View/Edit Questions in Set screen to add, delete, and resequence questions.

SRS - [View/Edit Questions in Set]

File Edit Window Help

19-Dec-97

Set: SETA - Rural Counties

ReSequence Add Question

Sequence	Question ID	Question Title	Type		
1	001	Labels-salt	5	...	✘
2	002	Labels-Fat	5	...	✘
3	CA045	Worry about food	5	...	✘
4	CA048	Fruit variety	5	...	✘

Record: 1 of 4

Form View FLTR NUM

Figure 6-4. View/Edit Questions in a Question Set

To rearrange the order of the questions, enter numbers in the sequence column to represent the relative order desired. Then click the ReSequence button.

CHAPTER 7 - THE SUBGROUPS SWITCHBOARD

About the Subgroup Feature

The Subgroups feature permits storing adults involved in a variety of programs, initiatives, or projects in the same database. They are identified by a Subgroup Code. Each adult must be assigned to at least one subgroup and may be assigned to as many as 8 subgroups.

The term “subgroup” is used to denote some class of adult participants in the database. The system will allow for up to 26 subgroups, designated A through Z.

Subgroup Filters are prepared to select (filter) the adults who meet the filter criteria. Almost all adult-based reports, including the Adult Summary, the Diet Summary, the Behavior Checklist Summary, and the Perinatal Projects Summary reports may be prepared from the adults who meet a filter’s criteria. Each level of the system, Federal, State, and Unit, may have its own subgroup codes and filters.

For control purposes, the following blocks of letters are reserved for each administrative level: A-L = Federal, M-V = State, W-Z = Unit.

Subgroups Switchboard

The Subgroups Switchboard is shown in Figure 7-1.

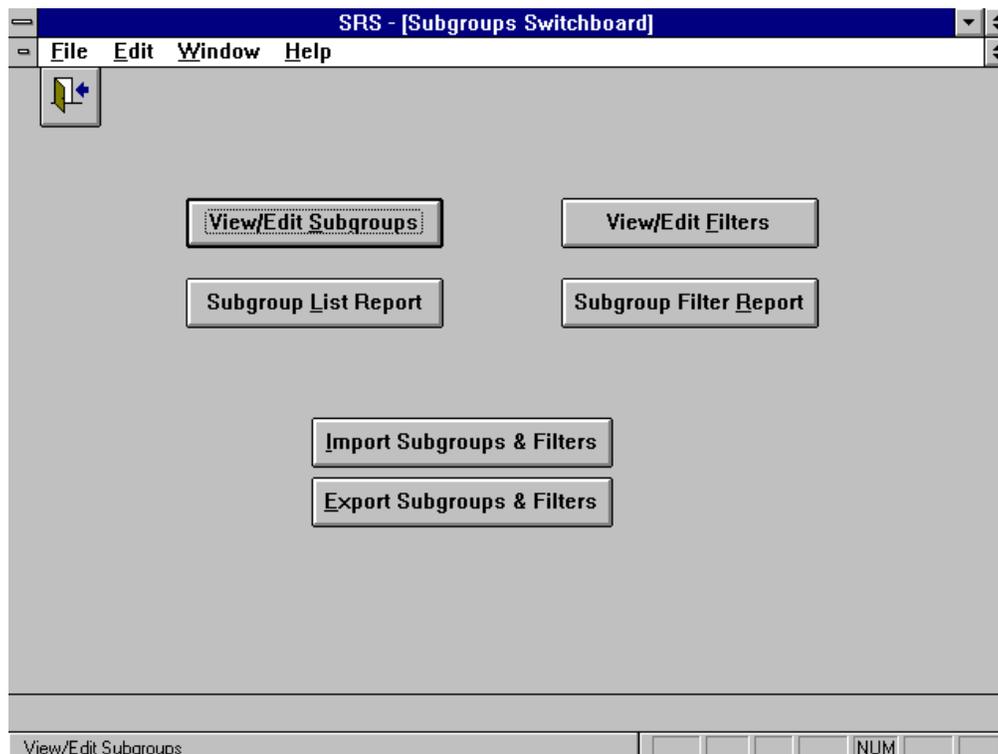


Figure 7-1. Subgroups Switchboard

Following is a brief description of the command buttons on the Subgroups Switchboard:

View/Edit Subgroups

View the Federal subgroup codes and view/edit the State subgroup codes.

Subgroup List Report

This report is a list of the subgroup codes and their names.

View/Edit Filters

View the Federal filters and view/edit the State filters.

Subgroup Filter Report

Prepare the Subgroup Filter Report. The Subgroup Filter report provides detailed information about each filter

Import Subgroups & Filters

Import the Federal Subgroups and Filters. Importing is described in Chapter 10.

Export Subgroups and Filters

Export the Federal and State Subgroups and Filters for the units in your State. Exporting is described in Chapter 10.

Subgroup Codes

The browse screen shown in Figure 7-2 is used to view the Federal subgroup codes and to view/edit the State subgroup codes.

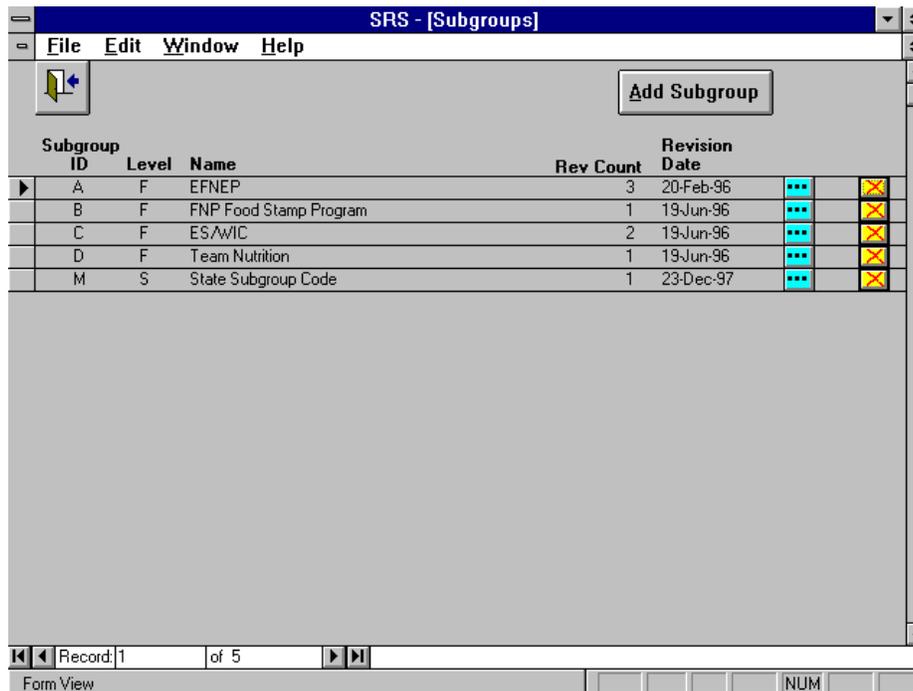


Figure 7-2. Subgroups Browse Screen

Note that if you delete a subgroup code after you have exported subgroups to your units, it still will be present in the unit systems unless you provide them a new export.

Subgroup Filters

Subgroup filters are designated Federal, State, or Unit, depending on who prepared the filter. You cannot revise Federal filters. When you export subgroups and filters to your units, both the Federal and State level subgroups and filters will be exported.

Figure 7-3 shows a sample subgroup filter expression. Separate command buttons are used to build the Participant Filter Expression (see Figure 7-4) and the Subgroup Filter Expression (see Figure 7-5). They are combined as the Full Filter Expression, also shown in Figure 7-3, which you can modify by clicking the Manual Revise button. See **Manual Subgroup Revision** later in this chapter for more information on using the Manual Revise button.

Figure 7-3. Build Subgroup Filter Screen

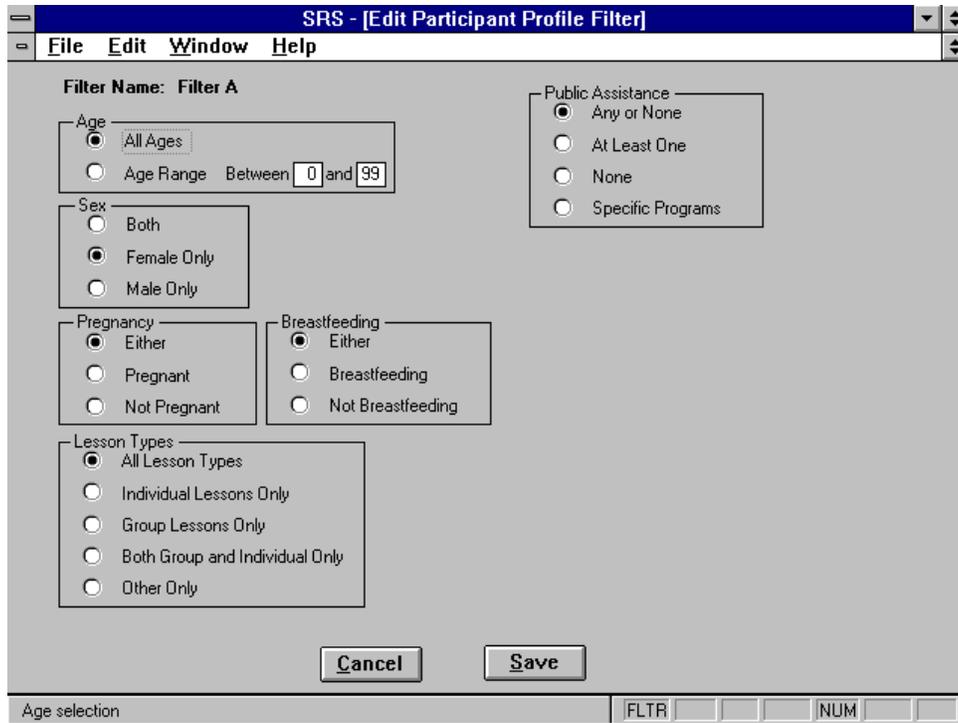


Figure 7-4. Edit Participant Profile Filter

You may make one choice from each box shown on the screen.

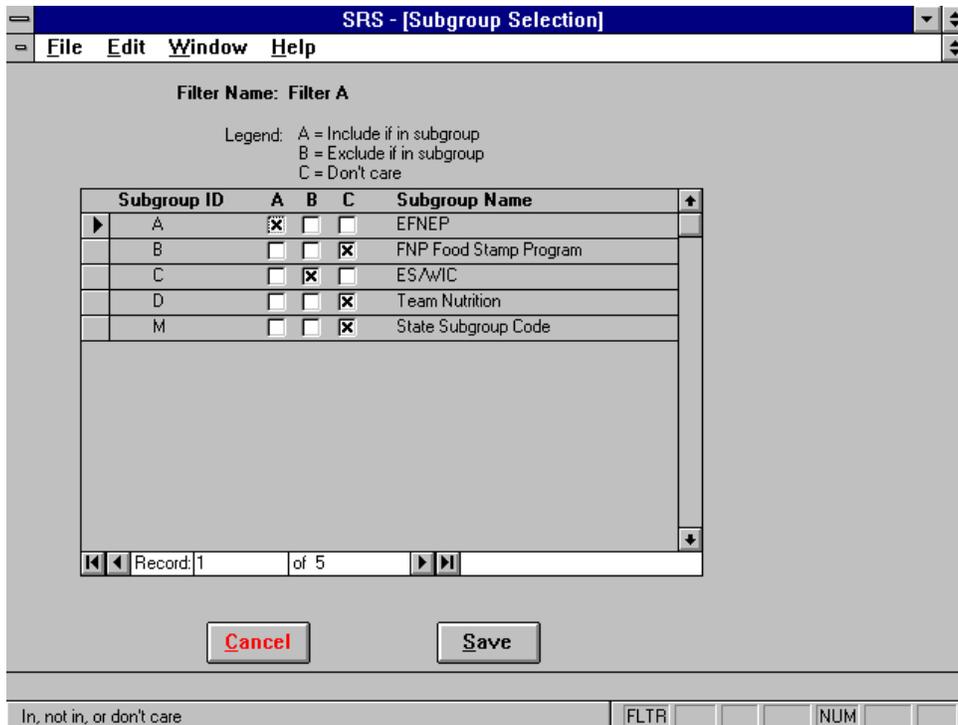


Figure 7-5. Subgroup Selection

Use the Don't Care choice to not test the adult as belonging (or not belonging) to that subgroup.

Manual Subgroup Revision

A subgroup filter expression uses fields from the adult record. Expression operators AND, OR, and NOT may be used.

Each time you change the Participant Profile or Subgroup Selection parts of a filter, all manual revisions are undone.

! *Only experienced users should attempt manual revision. Be sure to balance parentheses and to leave a space between terms in the expression.*

One reason for manual revision would be to change an expression such as **isInSubGroups("AB")**, which is true if the adult is in *either* of the subgroups, to **isInSubGroups("A") AND isInSubGroups("B")**, which is true if and only if the adult is in *both* of the subgroups.

Sometimes you need to base a filter on fields in the adult record not available in the normal expressions. The following four fields can be used in manual expressions:

Field	Type	Description
RaceCode	Character	The race code, e.g. "2-01"
Income	Number	Family monthly income.
TownSize	Character	Residence Code: "1" through "5".
LessonCount	Number	Number of lessons

Some sample expressions:

<u>Expression</u>	<u>Comment</u>
RaceCode = "3-02"	Specific race code
RaceCode LIKE "4*"	All race codes starting with 4
Income >= 300	Income greater than or equal to \$300.
Income BETWEEN 100 AND 400	(Income >= 100) AND (Income <= 400)
TownSize = "4"	Suburbs of cities over 50,000
LessonCount < 5	Fewer than 5 lessons

The LIKE operator allows wild card (*) matches. The BETWEEN operator is used to select within a range. The comparative operators < (less than), > (greater than), and = (equals) may be used with both character and numeric fields.

CHAPTER 8 - THE TABLES SWITCHBOARD

The Tables Switchboard

The Tables Switchboard, Figure 8-1, is used maintain State-unique versions of the Race Code table and the Foods database. Unlike the Unit level system, the Race Codes and Foods database are always available for updating.



Figure 8-1. Tables Switchboard

Race Code Table

The Race Code table provides the racial/ethnic codes. The race/ethnic codes consist of a one-digit code followed by a two-digit subcode designation. If no subcode is used the designation is 00. Racial/ethnic designations do not denote scientific definitions of anthropological origins. A program participant may self-select the group in which he or she appears to belong, identifies with, or is regarded in the community as belonging to. No person should be counted in more than one racial/ethnic category. The specific categories listed below conform to definitions for legally-protected classes.

In compliance with Department of Justice rules and regulations, all recipient agencies of federally-assisted programs, which are required to collect racial participation data, must use the following revised racial/ethnic categories:

1-00 - White (not of Hispanic Origin)

A person having origins in any of the original peoples of Europe, North Africa, or the Middle East.

2-00 - Black (not of Hispanic Origin)

A person having origins in any of the black racial groups of Africa.

3-00 - American Indian/Alaskan Native

A person having origins in any of the original peoples of North America, and who maintains cultural identification through tribal identification or community recognition.

4-00 - Hispanic (of any race)

A person of Mexican, Puerto Rican, Cuban, Central or South American or other Spanish culture or origin, regardless of race.

5-00 - Asian or Pacific Islander

A person having origins in any of the original peoples of the Far East, Southeast Asia, the Indian Subcontinent, or the Pacific Islands. This area includes, for example, China, Japan, Korea, the Philippine Islands, and Samoa.

The Race Code table may be edited at the State level and the results exported for use by the units in the State. Figure 8-2 shows a Race Code table with sub-codes.

Race Code	Racial Group
1-00	White
1-01	Caldean
1-02	French Canadian
1-03	Portuguese
2-00	Black
2-01	African American
2-02	Creole
2-03	Ethiopian
2-04	Haitian
3-00	American Indian/Alaskan
3-01	Alaskan
3-02	Aleut
3-03	American Indian
4-00	Hispanic
4-01	Caribbean
4-02	Central American
4-03	Mexican
4-04	South American
5-00	Asian or Pacific Islander
5-01	Cambodian
5-02	Chinese

Figure 8-2. Race Code Table Browse Screen

The setup disks for the unit level system (ERS) are shipped with the base 5 race codes. The setup disks for the State level system (SRS) are shipped with the suggested race subcodes. If your State uses subcodes, you will need to export the race code table, RACES.DBF, for your units - once you have made any State-specific changes to the SRS Race Code table. If your State does not use race subcodes, delete all subcodes from the SRS Race Code table, leaving only the base codes.

About the Foods Database

The Foods Database is the database containing the nutrient values and servings of food groups for each food. The food dictionary, an alphabetical printout of all the foods currently in the database (by food name), is included in Volume 3. The Foods Database is designed to be a "generic", reliable, concise database for use by all EFNEP States and territories. Nutrient values of most foods were taken from the USDA Handbook #8 series or the database from Agriculture Research Service that was used to analyze the Nationwide Food Consumption Survey. Additional recipes, manufacturers' and ethnic food data were entered to make the database as complete as possible. You may enter additional foods commonly eaten in the community to the database.

When the Foods Database is to be updated or edited, the source of the information should be documented and a printout or listing of the information and who entered the data should be kept. To maintain the integrity of the system, it is highly recommended that the database be edited only at the State office (copies can then be distributed to County offices).

Foods were entered in standard amounts. Units included those for items (apple, sandwich, slice, etc.) and those for measures (teaspoon, tablespoon, ounce, cup). Standard Units for meat = 1 ounce, beverages = 1 fluid ounce, and mixed dishes = cup. Since only one database portion can be used (and the portion size cannot be manipulated like other dietary analysis programs), use standard portions or utilize the conversion table in Volume 3. The Foods Database is organized or indexed by food name. The food names for many types of foods are listed by category, such as bread, juices, chicken, fish, beef, turkey, cereal, candy, soup, sandwiches and sauces. These foods are all listed with the category name first, then a comma, and then a more precise description (such as chicken, thigh, batter/fried). When adding new foods, be sure to consistently organize food names in a similar manner to ensure foods are displayed in correct alphabetical order. Food ID numbers were originally organized in alphabetical order by food name (1=alfalfa sprouts). Although added foods will be assigned the next ID number, they may be accessed alphabetically by food name.

From time to time, a new foods database may be supplied by EFNEP headquarters. This will probably be a complete replacement; however any local changes may be retained through a comparison feature. Refer to Chapter 10 for details on importing and exporting the Foods Database.

Updating the Foods Database

When new food items are added, the dialog box shown in Figure 8-3 will prompt you for the ID of the new food item. Use IDs starting at 90000 to avoid duplicating IDs that may be used at the national level.



Figure 8-3. Identification of New Food Item

The Edit Food Item screen, Figure 8-4, is used to enter the new values. Table 8-1 identifies the specific information to be completed in this edit screen.

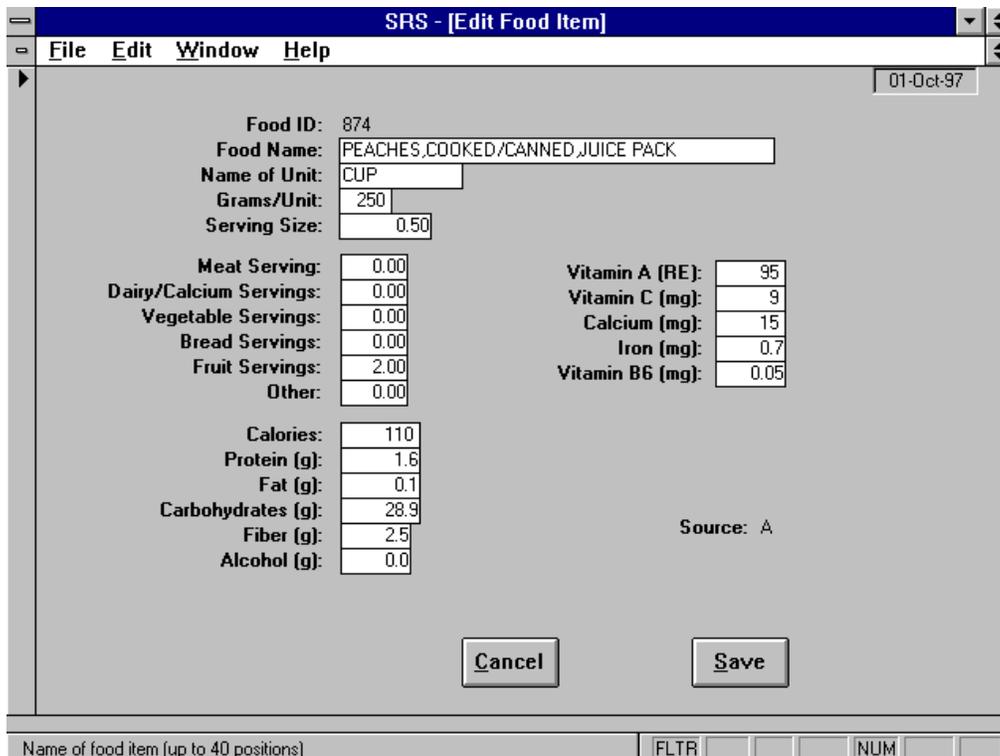


Figure 8-4. Foods Database Edit Screen

Table 8-1. Data Fields in the Foods Database

ID	When new food items are added by a State, the assignment of the ID number must be coordinated, so it does not duplicate a number being assigned to another food item by headquarters. Units should use the 90000 to 99999 range of ID numbers for locally generated items.
Food Name	The food name may have up to 40 characters.
Name of Unit	Enter a descriptive name for the size of the food item. Examples include ounce , slice and cup . Name of unit can be up to 10 characters.
Grams/Unit	Enter the weight in grams of the unit of food. (1 ounce is approximately 28 grams).
Serving Size	Enter the quantity of the food item needed to make a standard serving. For example, be sure to distinguish between serving sizes of cups and ounces.
Bread/Cereal Servings	Enter the number of bread servings provided by this unit of food.
Fruit Servings	Enter the number of fruit servings provided by this unit of food.
Vegetable Servings	Enter the number of vegetable servings provided by this unit of food.
Meat and Alternate Servings	Enter the number of meat/alternate servings provided by this unit of food.
Dairy/Calcium Servings	Enter the number of dairy/calcium servings provided by this unit of food.
Other	Enter the number of other (added fat and sugar) servings provided by this unit of food. Each serving of an "other" is equivalent to approximately 35 calories (1 tsp. fat or 2 tsp. sugar).
Calories	Enter the number of calories provided by this unit of food.
Protein (g)	Enter the grams of protein provided by this unit of food.
Fat (g)	Enter the grams of fat provided by this unit of food.
Carbohydrates (g)	Enter the grams of carbohydrates provided by this unit of food.
Fiber (g)	Enter the grams of fiber provided by this unit of food.
Alcohol (g)	Enter the grams of alcohol provided by this unit of food.
Vitamin A (RE)	Enter the number of Retinol Equivalents of vitamin A provided by this unit of food.
Vitamin C (mg)	Enter the milligrams of vitamin C provided by this unit of food.
Calcium (mg)	Enter the milligrams of calcium provided by this unit of food.
Iron (mg)	Enter the milligrams of iron provided by this unit of food.
Vitamin B6 (mg)	Enter the milligrams of vitamin B6 provided by this unit of food.

Source Codes

The source code indicates which source of nutrient composition information was used. All records added or modified by the State will have a source code of S. Table 8-2 identifies the source codes.

Table 8-2. Foods Database Source Codes

A	ARS (was HNIS) database
B	USDA Handbook 8 series
C	Manufacturers data
D	Reliable local data or recipe
S	State system (SRS)
U	Unit system (ERS)

Food Dictionary

This function is used to prepare a listing of the Foods database. The listing may be sorted by Food ID or Food Name. Optionally, the report may be sent to your word processor for revision and annotation. Annotated copies of the Food Dictionary may aid in locating food items in the Foods database.

CHAPTER 9 - THE SYSTEM ADMINISTRATION SWITCHBOARD

System Administration Switchboard

The System Administration Switchboard, Figure 9-1, is used to perform system administration and housekeeping functions.

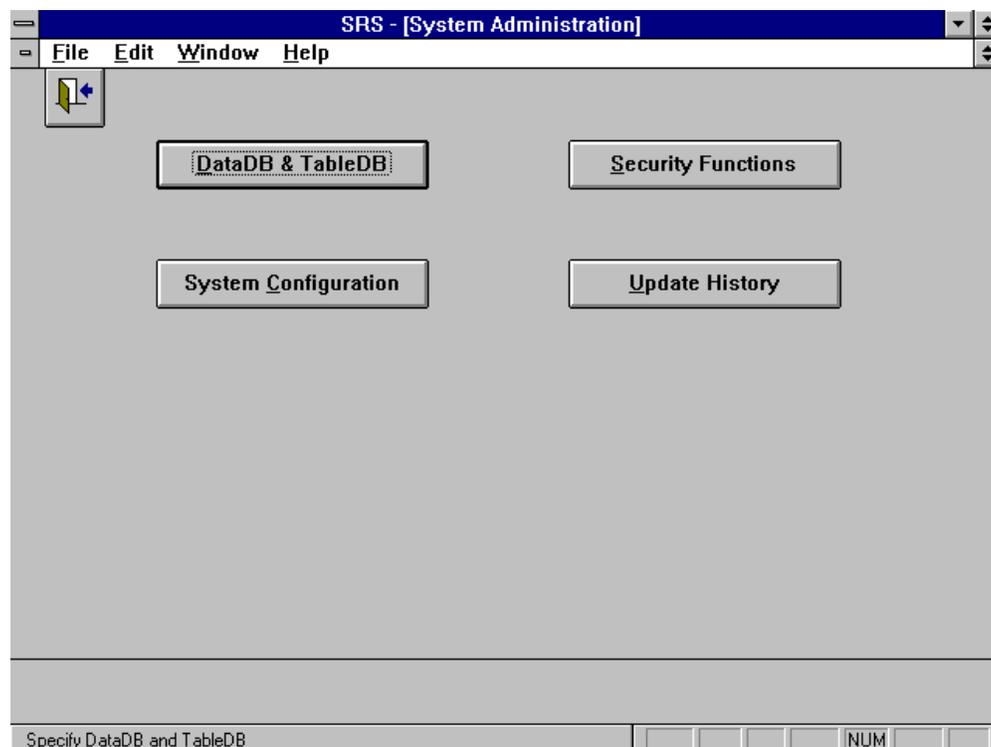


Figure 9-1. System Administration Switchboard

DataDBs and TableDBs

About DataDBs and TableDBs

The system uses two databases to hold the data: a DataDB and a TableDB.

Each has a name which may be up to 16 characters long. This name is a short cut name for the full path to the database. The initial names are DATA and TABLES.

The DOS file name of all DataDBs is SRSDAT40.MDB, and the DOS file name of all TableDBs is SRSTBL40.MDB. A DataDB and a TableDB may be in the same directory.

The setup program (Chapter 12) will create an empty DataDB and a default TableDB as follows:

Database	Name	Location (Path)
DataDB	Data	C:\SRS4\DATA
TableDB	Tables	C:\SRS4\TABLES

You should maintain separate DataDBs and TableDBs for each reporting period or fiscal year. You may also want to create a separate DataDB for training.

The DataDB and TableDB are the only two files that need to be backed up on a regular basis. See the SRS Tools in Chapter 11.

Attaching a DataDB and a TableDB

Database attachment is a process of making the data it contains more rapidly accessible to the system. The way to switch from one DataDB to another is to *attach* the new one.

From the lists of available DBs on the Attach DataDB and TableDB screen, Figure 9-2, click the ones you want to attach. Then click the Attach button. Note that Figure 9-2 is an example of using the same directory for the DataDB and TableDB.

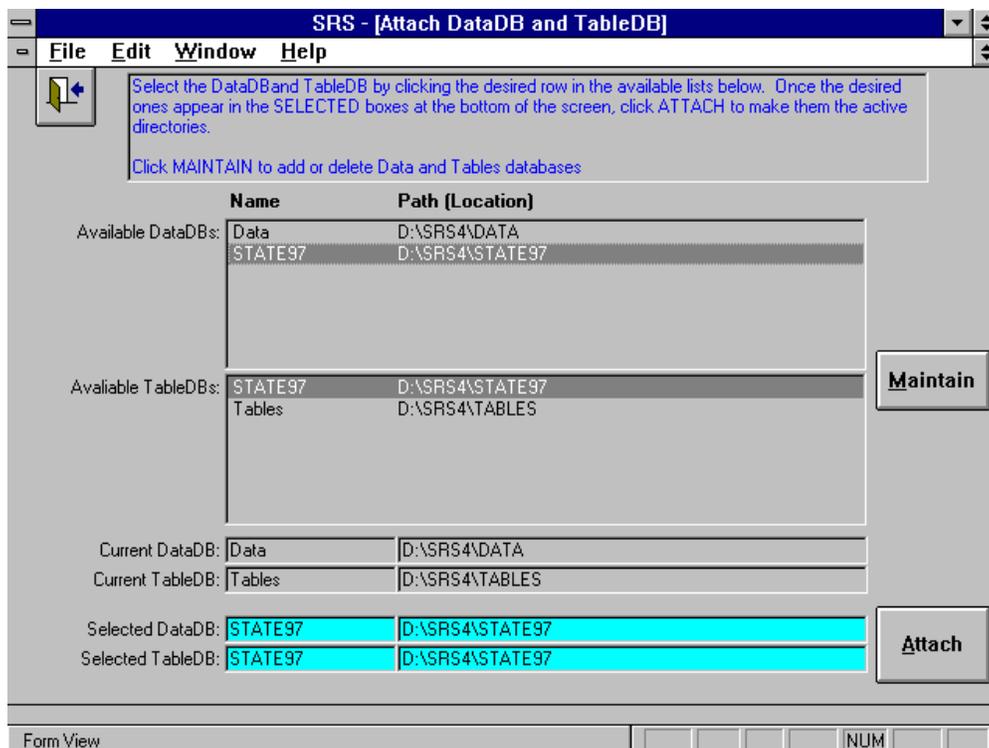


Figure 9-2. Attach DataDB and TableDB

DataDB and TableDB Maintenance

Click the Maintain button on the Attach DataDB and TableDB screen, Figure 9-2, to maintain the two available lists.

Maintenance functions are: delete a DB, add a DB, and change the location of a DB. The Maintain DataDB and TableDB screen is shown in Figure 9-3.

Use the Windows File Manager to create directories to hold the new DataDB or TableDB and to explore your hard drive.

Use the Add DataDB and the Add TableDB buttons to create a new entry. This is a two step process:

1. Supply a name for the new DataDB or TableDB that you are adding. This is shown in Figure 9-4. Click Next after entering the name. This will open the Select Directory screen shown in Figure 9-5.
2. Select the directory to contain the new DataDB or TableDB by clicking the Browse button on the Select Directory screen. This will open the Specify Directory dialog box shown in Figure 9-7. Use it to position to the desired directory and click OK to copy that directory name into the Path field on the Select Directory screen. Click Save to add the new DataDB or TableDB to the list of ones that may be attached.

! *The first time you attach a new DataDB or TableDB, you will be notified that the database does not exist and asked if you want to create it. Usually, you will respond with Yes. If you think the database already exists, click No and use File Manager or some other tool to investigate.*

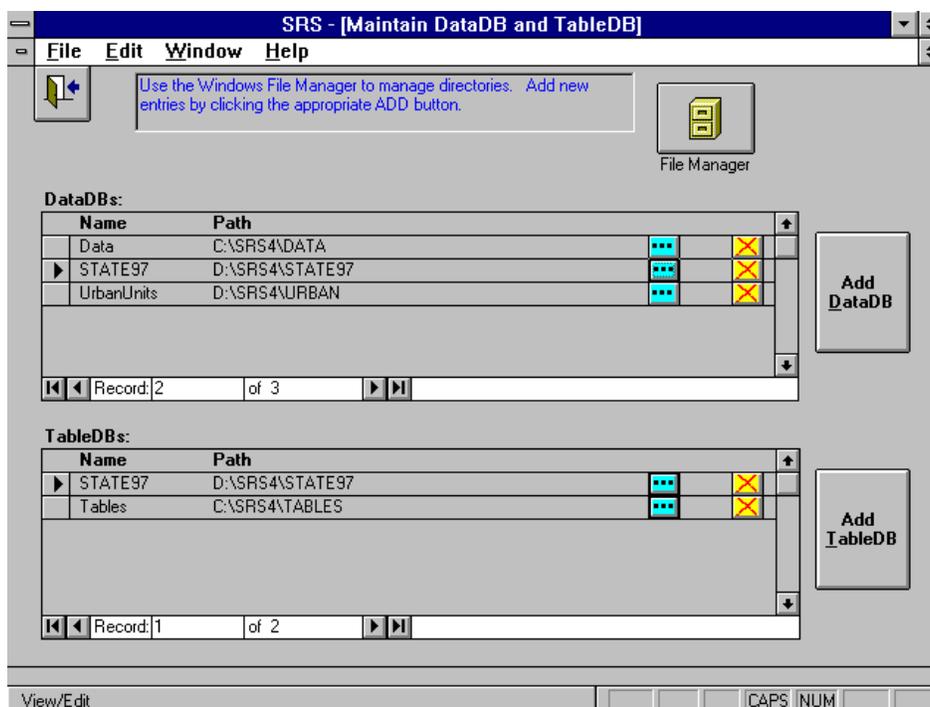


Figure 9-3. Maintain DataDB and TableDB

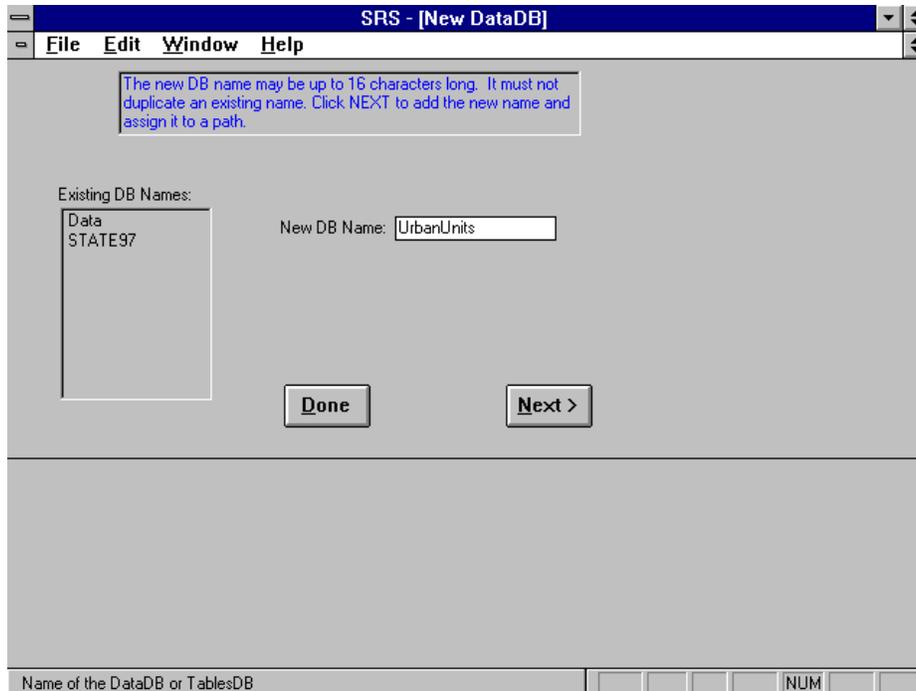


Figure 9-4. Naming a New DataDB

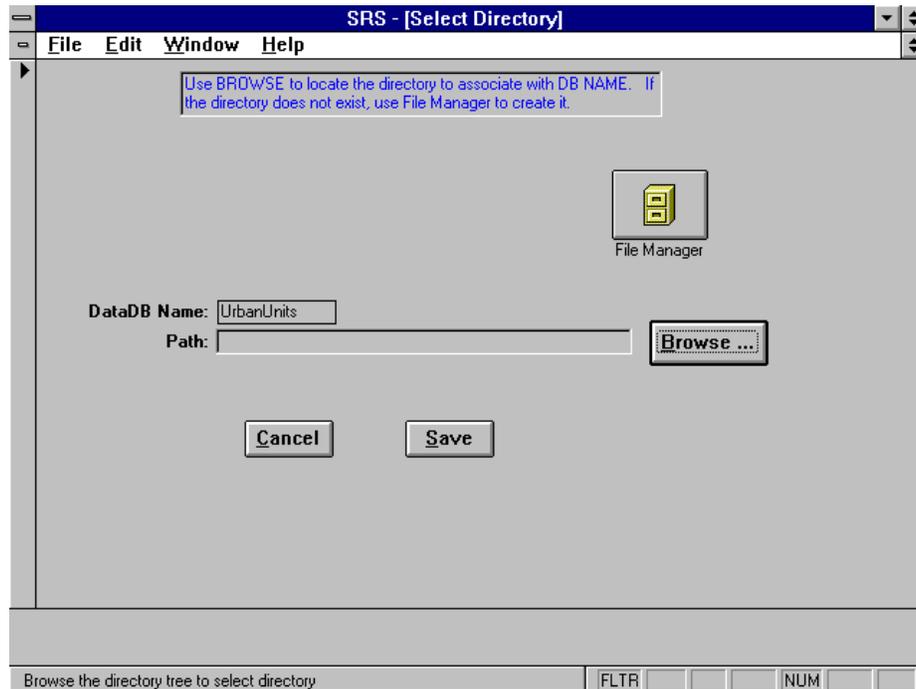


Figure 9-5. Selecting the Location for a New DataDB

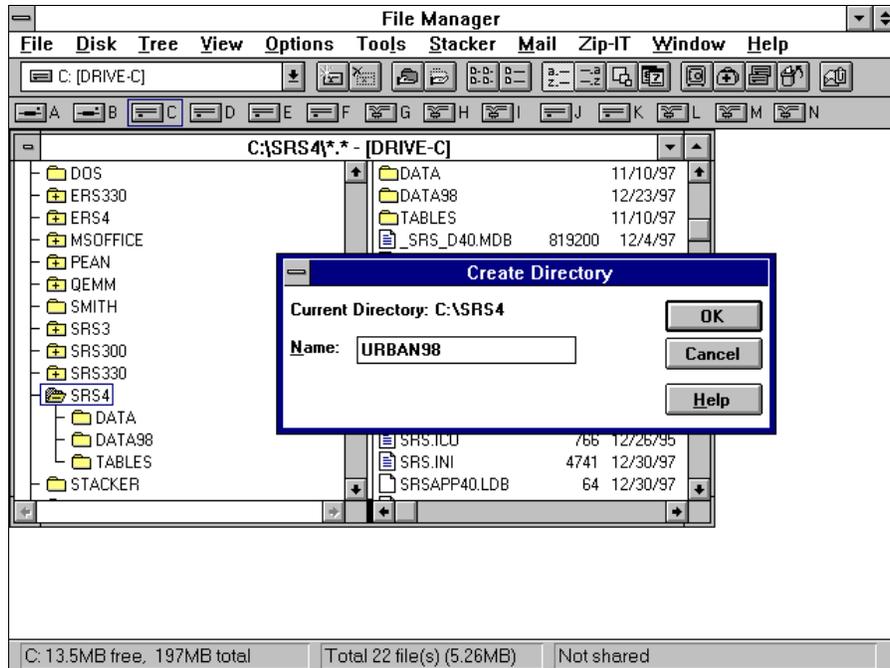


Figure 9-6. Using File Manager to Create a Directory

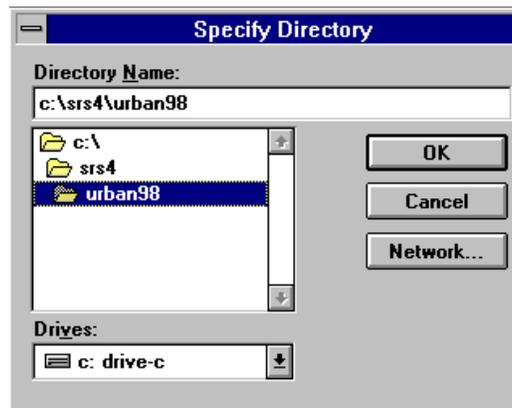


Figure 9-7. Using Browse to Identify Directory

The first time you attach to a new DataDB or TableDB, the system must create the MDB file. Before creating it, the system provides the notice shown in Figure 9-8. The only time you might respond with a Cancel is if you believe the DataDB or TableDB already exists. For example, it may be on a network drive and the network is down.

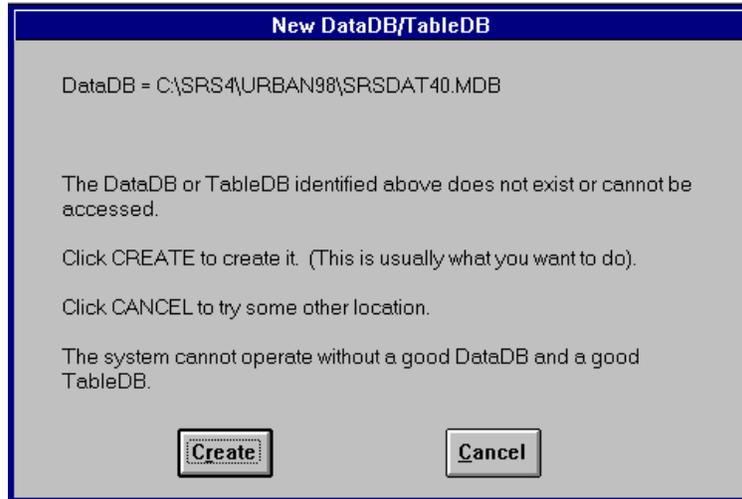


Figure 9-8. Create New DataDB/TableDB Notice

System Configuration

Use the System Configuration Edit screen shown in Figure 9-9, to identify your state and specify the reporting period.

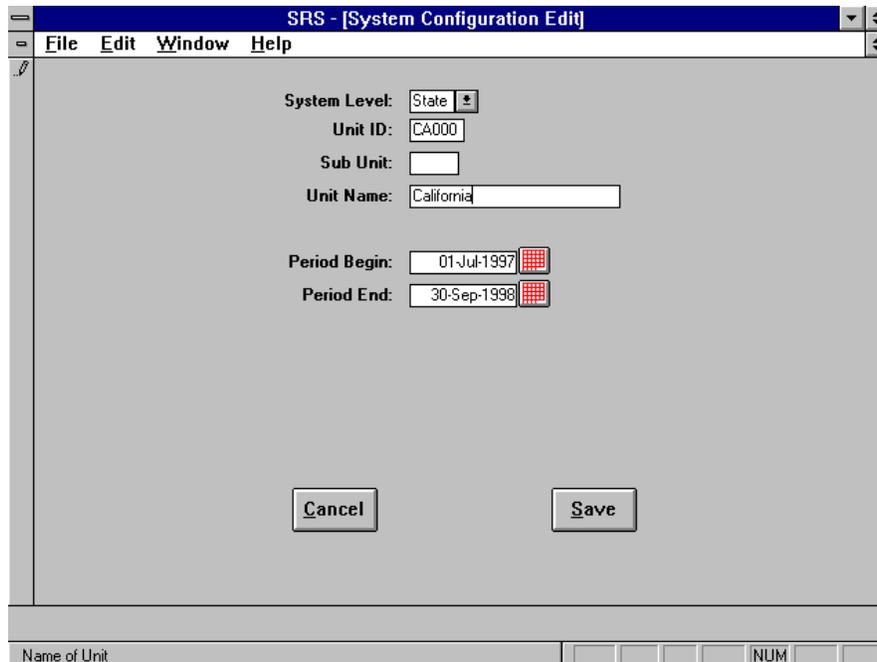


Figure 9-9. System Configuration Edit Screen

Identification

Unit ID and optional Sub-Unit ID identify the unit. Use the two letter state abbreviation plus 000 for the Unit ID. Leave the Sub-Unit ID blank.

Unit Name is usually the name of the State.

! *The State level system can be used to create district and regional summaries as well as state wide summaries. To do this, create a DataDB for the area and import the summary data from its units. In this case, use the State abbreviation plus the FIPS code as the Unit ID.*

Report Period

The Report Period is used to specify the time period of the active data. Usually the fiscal year is used as the report period. When importing summary data, its report period must end sometime during your report period. (Usually, the reporting period for the units will be the same as the one used at the State level.)

Security Functions

Use this function to add and remove users, and to change your password.

The system maintains two levels of permissions for users: Executive and Data Entry. The only difference between them at present is that Data Entry users cannot manage security, they can only change their own password.

! *Remember that passwords are case sensitive. PassWord and Password are not the same.*

New systems have user ID **ERS** and with password **ERS**. Use user ERS to set up your specific users. Do not delete user ERS, and do not change its password, until you are confident you can add users and perform the other security functions. *Be sure there is always at least one Executive user!* See Volume 3 for additional guidance on security and passwords.

The dialog box, shown in Figure 9-10, is used to add users, delete users, clear their passwords, and set their permissions level.



Figure 9-10. Manage Security

Update History

This feature provides for a description of any software updates applied to the system. Updates are made from the SRS Tools application. Use Help→About to see your current version, as shown in Figure 2-17.

CHAPTER 10 - THE DATA INTERCHANGE SWITCHBOARD

Data Interchange Switchboard

The Data Interchange Switchboard, Figure 10-1, facilitates the transfer of data to and from the units in your State, and to and from the Federal offices.



Figure 10-1. Data Interchange Switchboard

Import Questions

This function imports the Additional Behavior Checklist questions prepared by the Federal Level system. The DOS file name is CKQMAS40.MDB.

Export Sets

This function exports the behavior checklist question sets for use by units in your State. As shown in Figure 10-2, you can select which question sets are to be included in the export. The DOS file name is CKQSET40.MDB.

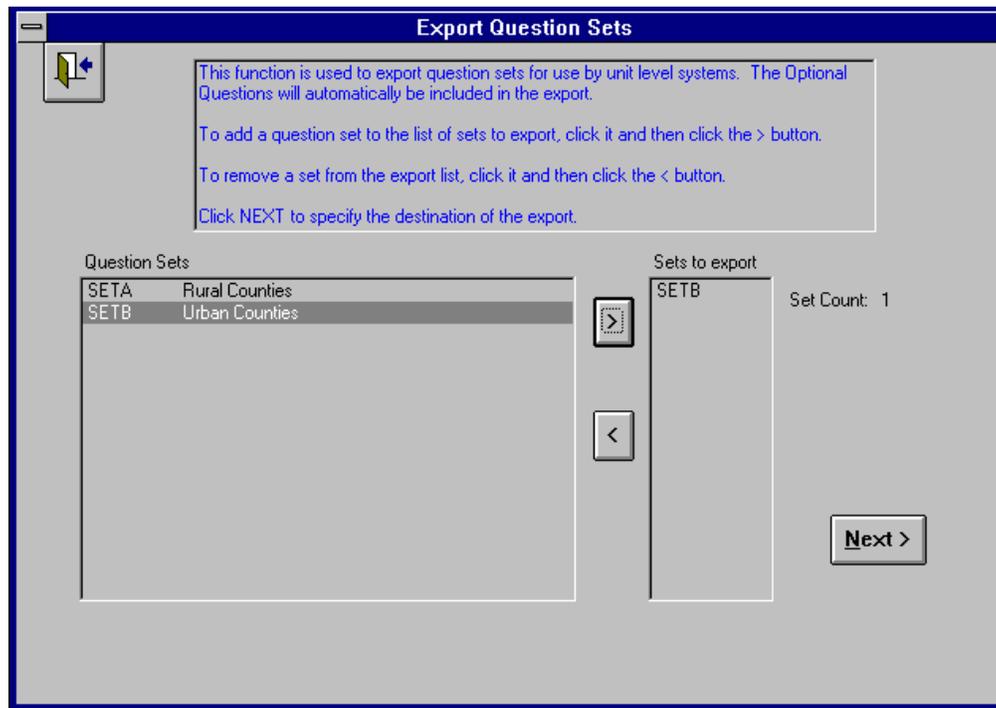


Figure 10-2. Selecting Question Sets to Export

Import Subgroups and Filters

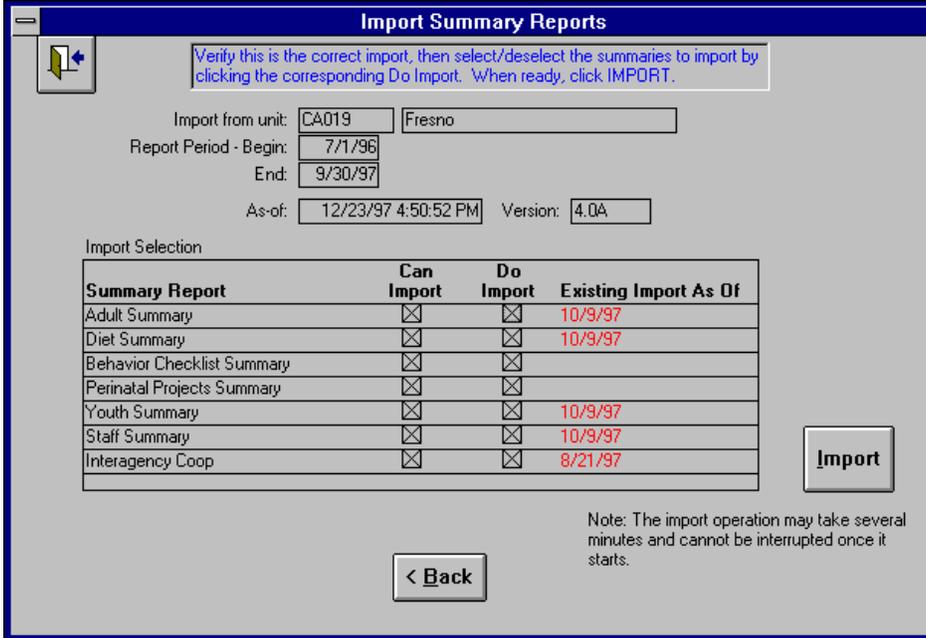
This function is used to import the Federal Level subgroup codes and subgroup filters. The DOS file name is SUBGRP40.MDB.

Export Subgroups and Filters

This function exports the Federal and State level subgroup codes and filters for use by units in your state. The DOS file name is SUBGRP40.MDB.

Import Summary Reports

This function is used to import the summary data prepared by units in your state. The screen shown in Figure 10-3 is used to confirm the correct data is being imported. The DOS file name is EXPSUM40.MDB.



Verify this is the correct import, then select/deselect the summaries to import by clicking the corresponding Do Import. When ready, click IMPORT.

Import from unit: CA019 Fresno

Report Period - Begin: 7/1/96
End: 9/30/97

As-of: 12/23/97 4:50:52 PM Version: 4.0A

Summary Report	Can Import	Do Import	Existing Import As Of
Adult Summary	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10/9/97
Diet Summary	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10/9/97
Behavior Checklist Summary	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Perinatal Projects Summary	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Youth Summary	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10/9/97
Staff Summary	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10/9/97
Interagency Coop	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	8/21/97

Note: The import operation may take several minutes and cannot be interrupted once it starts.

Figure 10-3. Import Summary Reports

The **Can Import** check box indicates which summaries were exported by the unit. Use the **Do Import** check box to select which ones to import. As a rule, the unit will export all summaries and you will import all of them. The **Can Import** and **Do Import** boxes are used for any exceptions. The **Existing Import As Of** column provides the as of date for any previous import from this unit.

Export Summary Reports

This function is used to export the State summary data to the Federal level system. Figure 10-4 shows the screen used to prepare the export.

For the Adult, Diet, Behavior Checklist and Perinatal Projects summaries, the system will prepare an export for each Federal level Subgroup Filter.

The *Report Also* option is used to retain a hard copy report of the data being exported. Be aware that if you select this option, you will need a considerable amount of paper.

In most cases you will export the data to a diskette. You can use the Browse button to select a different drive and directory. The DOS file name is EXPSUM40.MDB.

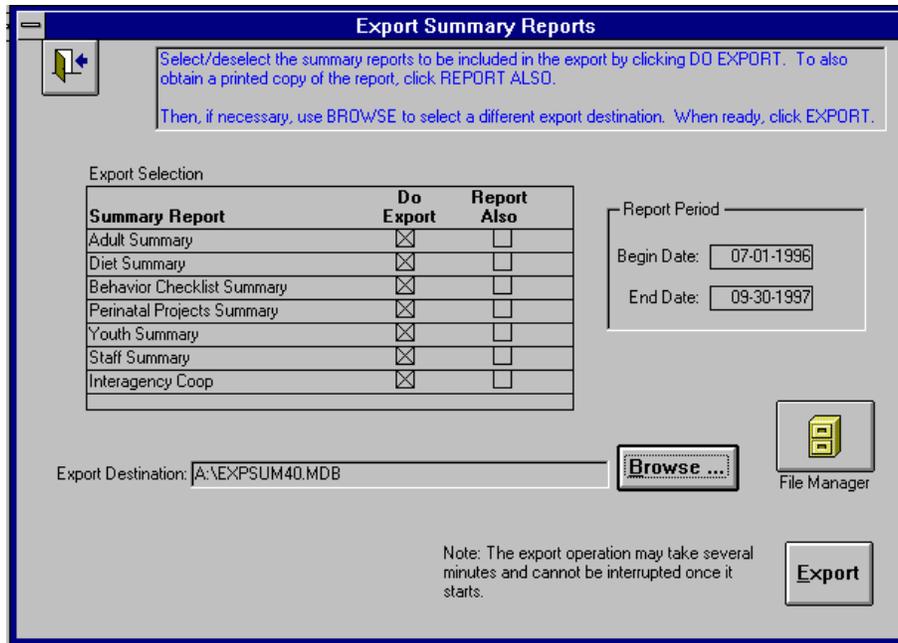


Figure 10-4. Export Summary Reports

Import Version 3 Summary Data

This function is used to import summary data exported by units in your state who are still using ERS Version 3.1 or 3.3.

Due to the change from 15 behavior checklist questions to 10 behavior checklist questions, ERS Version 3.1 Checklist Summary data cannot be imported. Use SRS 3.1 to import the 15-question checklist summaries, print the summary report, and export the summary data to the FRS Version 3.1. Until all units in your state are using the 10-question behavior checklist, you will have this dual path.

- ! *Be sure there is only one file in the import-from directory with a name starting with IAC. The first such file is assumed to be the Interagency Cooperation data exported by the unit.*

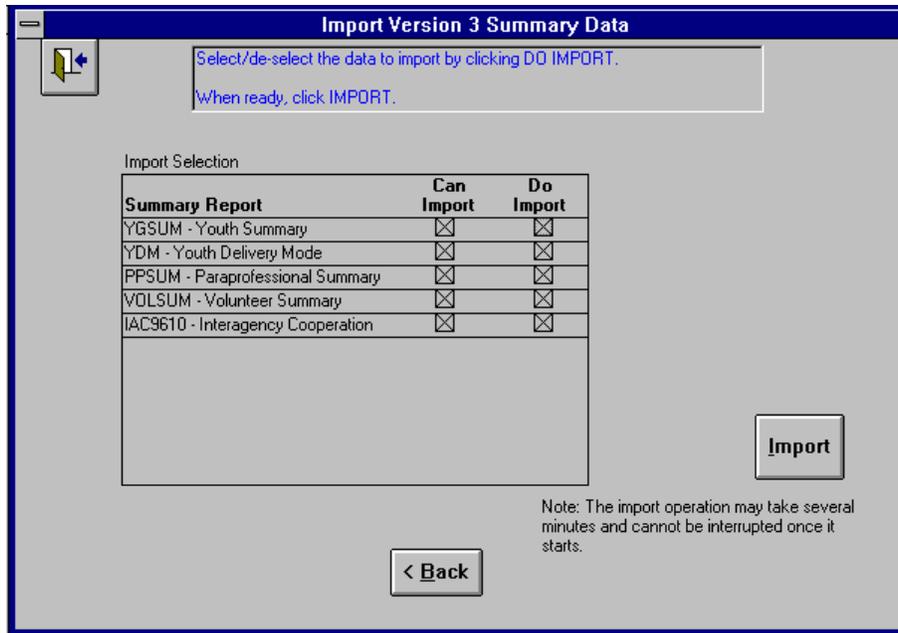


Figure 10-5. Importing Version 3 Summary Data

Import Foods Database

The Import Foods Database function is used to import a new Foods Database supplied by EFNEP, Washington, DC. The import file must be a dBase III file with a name of FOODS.DBF.

You may choose between two import strategies:

Complete Replacement: If you choose Complete Replacement, the existing Foods database will be deleted and replaced with the new one.

Retain Local Changes: If you choose Retain Local Changes, all foods records with a source code of S, which is the source code assigned to any food items modified at the State level, are not deleted. Those with a source code other than S are deleted. The new Foods database is then merged with the food items with a S source code. If a food item from the import has the same ID as one with a S source code, both records will be displayed on the screen for you to select which one to keep.

Export Foods Database

This function exports the Foods database for use by the units in your state. It is a dBase III file with a name of FOODS.DBF.

Export Race Codes

This function exports the Race Code table for use by units in your state. It is a dBase III file with a name of RACES.DBF.

Import Race Codes

This function imports a Race Code table. It must be a dBase III file with a name of RACES.DBF.

CHAPTER 11 - SRS TOOLS

SRS Tools provides functions for maintaining a healthy, reliable system. It is started by double clicking the SRS Tools icon in the SRS Program Group or by clicking the Tools button on the SRS Main Switchboard. The SRS Tools Switchboard is shown in Figure 11-1.

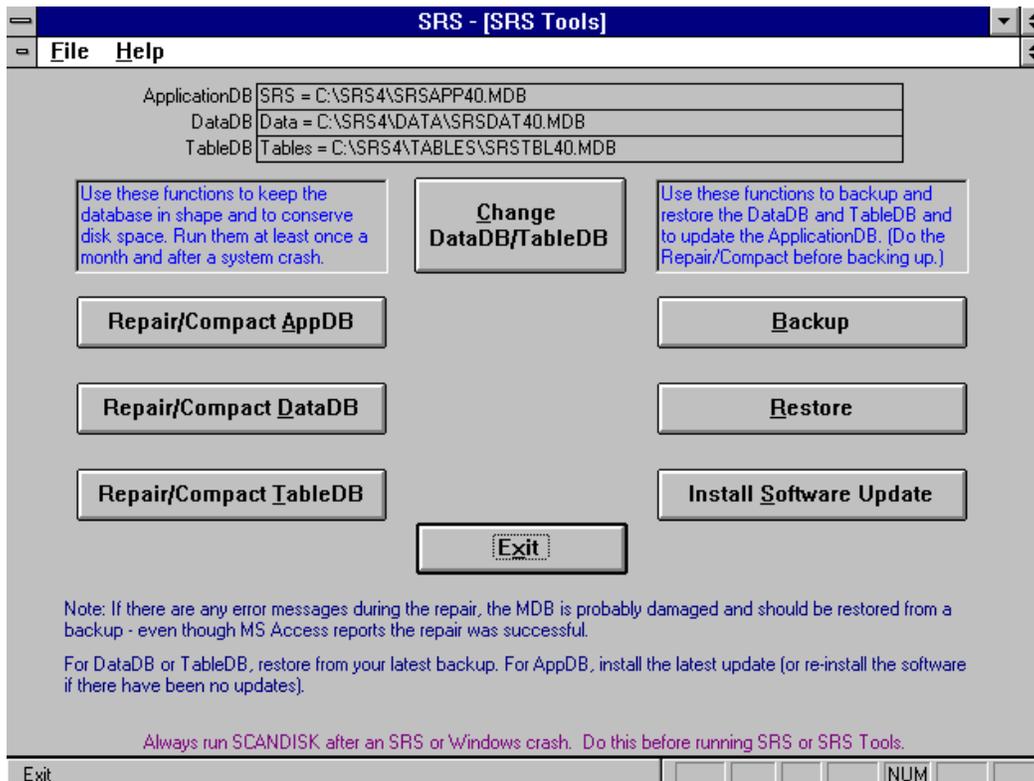


Figure 11-1. The SRS Tools Switchboard

Repair/Compact Database

The system consists of three databases. They should be repaired and compacted on a regular basis.

The database may become corrupted if the system quits unexpectedly; for example, if there is a power outage or your computer experiences a hardware problem. The database will not become corrupted if you quit the system normally.

The compact operation prepares a copy of the database, rearranging how the database file is stored on disk if it is fragmented. File storage can become fragmented when you make many changes to a database. The compacted database file is usually smaller and often provides better performance. (This Repair/Compact operation is analogous to the dBase Pack Database function used in SRS 3.x.)

! *At the completion of the repair phase, Microsoft Access will issue a popup message that the repair completed successfully. Click OK to continue to the compact step.*

If any error messages are issued during the repair operation, there is a good chance some data was lost even though the database is no longer corrupted. If this happens, you need to restore from a backup as the data is no longer valid!

Backup

The backup function, Figure 11-2, prepares a Zip file of the DataDB or TableDB. Use these backup and restore functions if your computer does not have better backup software.

Use the Browse button to change the Backup-To directory. You can place the Zip file on your hard drive. If you do, remember where you placed it.

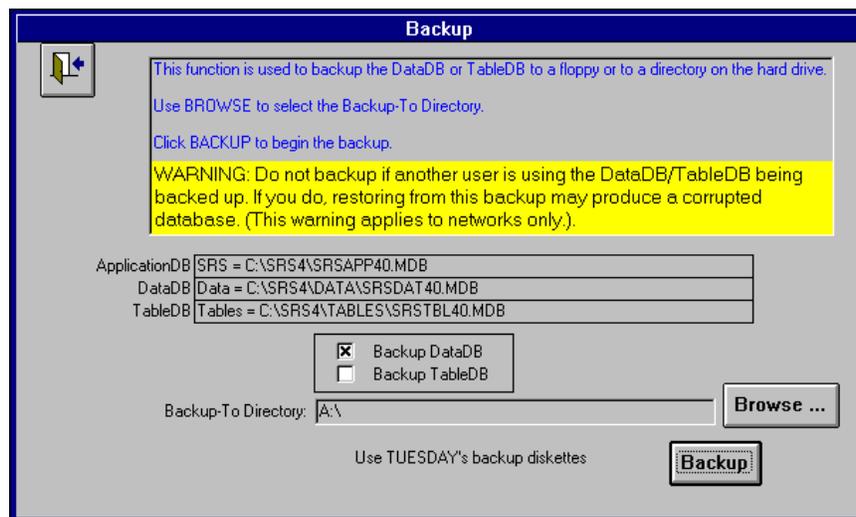


Figure 11-2. Backup DataDB or TableDB

! *Be sure to establish a rotation scheme for your backup diskettes. Sometimes a problem will go undetected for several days.*

After you backup to floppy disks, it is a good idea to test them. Testing the backup floppies now reduces the chances of a disk read error should you need to restore later. Restores only work from good backups! To test, remove and re-insert the diskette. This makes sure Windows will actually read the floppy and not use a memory copy. Then use the Restore Test function described below.

Restore

The restore function unzips the Zip file created by the Backup function. Figure 11-3 shows the first step of the restore: locating the Zip file to be restored. Figure 11-4 shows the screen that appears once the Zip file has been located and opened. Note that you can restore to a different directory than the one used for the backup. The system allows you to test the file before you do the restore. It is a good idea to do this test in case the diskette has developed a bad spot.

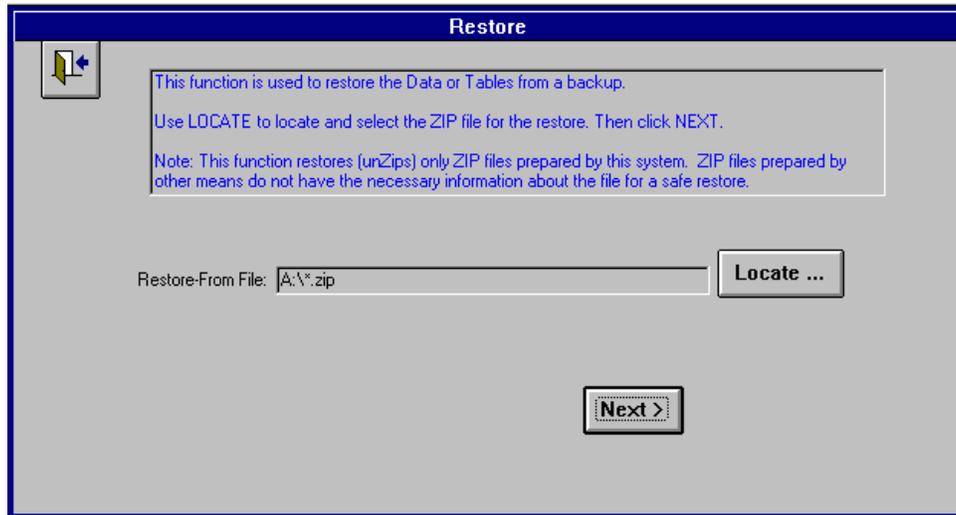


Figure 11-3. Restore - Locating the ZIP File

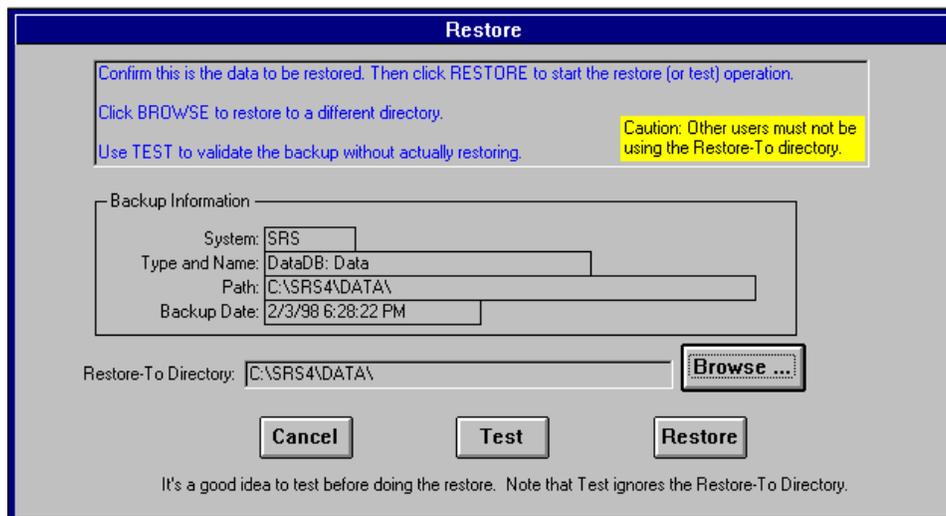


Figure 11-4. Confirm/Initiate Restore

Be sure to examine the Type and Name, Path, and Backup Date to be sure you are restoring from the desired backup.

- ! Test does not use the Restore-To Directory. If you are restoring to a different directory than the one used to prepare the backup, wait to use Browse to locate it after you test.

Backup/Restore Errors

A common error is to attempt to backup to an unformatted, full, or write protected diskette. Another is to start the backup or restore without first inserting the proper backup diskette into the floppy drive.

If a backup diskette develops I/O errors, you may want to try reformatting it. Attempts of using ScanDisk to repair bad spots in ZIP files are usually unsuccessful.

Install Software Update

Software updates will be distributed in two forms:

1. Zip File - Basic updates will be distributed as a Zip file.
2. SETUP.EXE - More complex updates will be distributed as an EXE file.

The initial screen for installing a software update is shown in Figure 11-5. Be sure to follow the instructions that came with the software update, as they may alter the standard procedures described here.

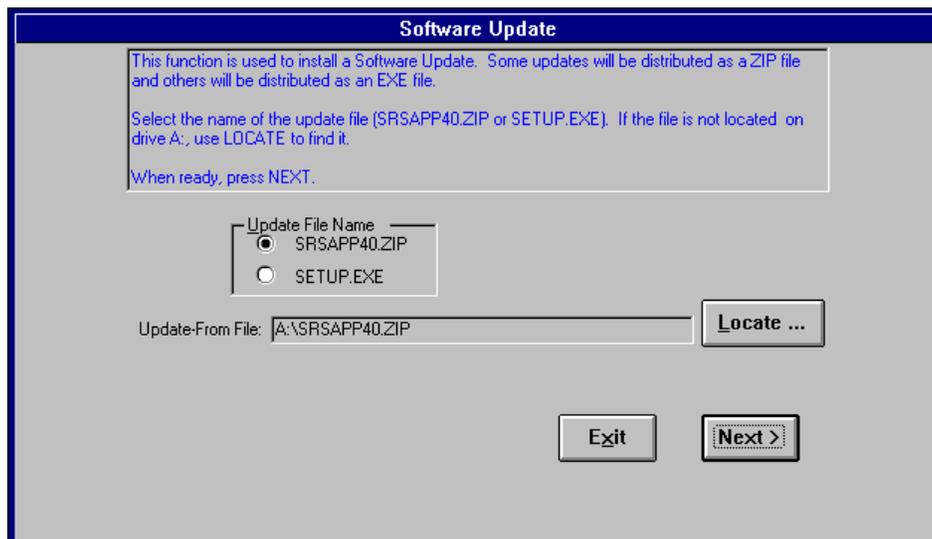


Figure 11-5. Install Software Update

Select SRSAPP40.ZIP or SETUP.EXE according to the type of update file. Click Next to begin the installation of the update.

Figure 11-6 shows the update description for ZIP files. You must test the Zip file before you can install the update. This is a precaution to minimize problems with faulty diskettes. Once the test completes successfully, the Install button will become enabled. Click it to install the update.

Figure 11-7 shows the start of an update with a SETUP.EXE. A SETUP.EXE is used for updates that can't be handled with a simple ZIP file. These updates will usually involve a number of steps much like a new installation.

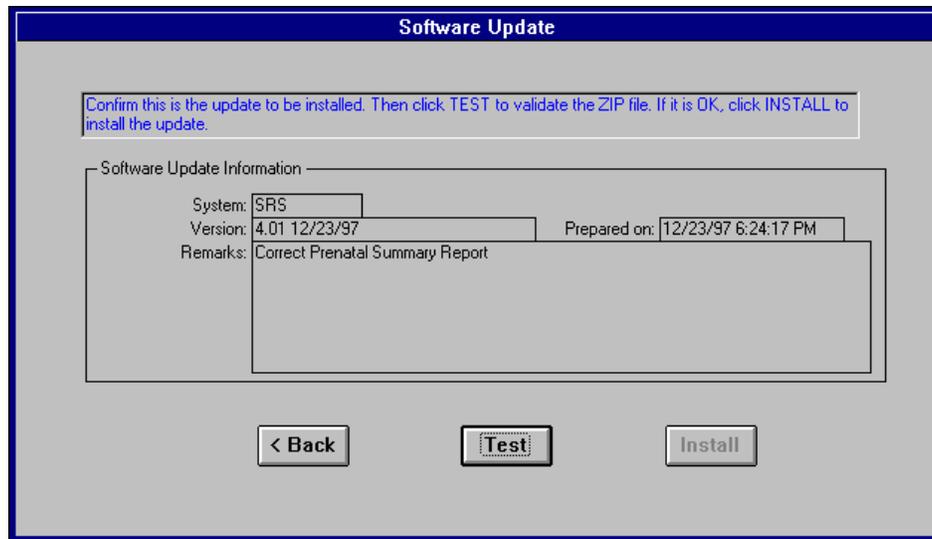


Figure 11-6. Description of Update from a Zip File

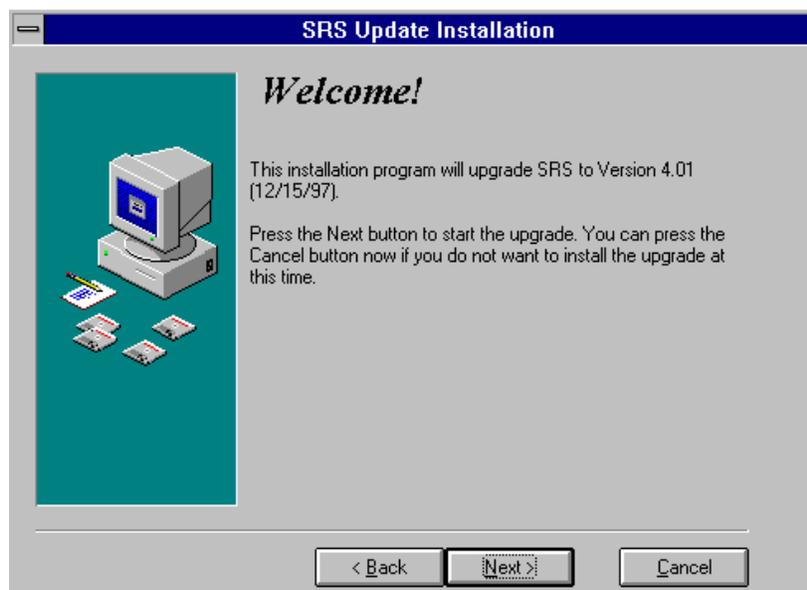


Figure 11-7. Start of Update with SETUP.EXE

CHAPTER 12 - INSTALLING THE SRS SYSTEM

Running SRS Setup

The SRS system installs much like many Windows programs: Run the SETUP.EXE located on the first installation (setup) diskette.

! *You are strongly advised to not install the system on a computer that uses drive compression. Operations that take five minutes on a regular computer may take 50 minutes on one with drive compression.*

Steps to install SRS

1. Make sure you have sufficient disk space. You should have at least 20MB of available space. Installation may be to any hard drive on your system. Do not install on a server unless you are willing to live with very slow response. (See LAN Installation below for placing the DataDB or TableDB on a server.)
2. Verify you have a complete set of setup diskettes.
3. Place the first diskette in your floppy drive, usually A:.
4. Run SETUP.EXE from that diskette. (Information on how to do this is given below.)
5. Follow the instructions on the screen. If you are installing to the default directory, C:\SRS4, you can press the Next button for each response.
6. Insert the other diskettes as requested and press the Enter key or click the OK button. ***On many computers, Disk 2 will not be used.***
7. Windows may restart at the end of the setup.
8. Remember to remove the last diskette when the setup has completed.

Ways to run SETUP.EXE with Windows 3.1 or Windows for Workgroups

You may use any of the following procedures to run SETUP.EXE. Use the one you are most comfortable with.

From File Manager, locate SETUP.EXE on the diskette, click it once to highlight it, then double click it.

From File Manager, locate SETUP.EXE on the diskette, click it once to highlight it. Then use File, Run from the menu bar to run it.

From Program Manager, click File on the menu bar (or press Alt-F). Then click Run and type A:\SETUP.EXE (or B:\SETUP.EXE if you are using the B: drive) in the Command Line box. Then click the OK button.

From Program Manager, click File on the menu bar (or press Alt-F) and click Run. Then use the Browse button to locate SETUP.EXE and fill in the Command Line for you. Then click the OK button.

Ways to run SETUP.EXE with Windows 95

You may use any of the following procedures to run SETUP.EXE under Windows 95. Use the one you are most comfortable with.

Open Control Panel and double click Add/Remove Programs. Follow the instructions on the screen.

Click Start, then Run. Then type A:\SETUP.EXE (or B:\SETUP.EXE if you are using the B: drive) in the Open box. Then click the OK button.

Click Start, then Run. Use the Browse button to locate SETUP.EXE and fill in the Open box for you. Then click the OK button.

! *Hint for Windows 95 users: Use Start, Settings, Task Bar to set the Task Bar options to Auto Hide. This hides the task bar until the mouse is moved over it.*

The Setup Dialogue

During installation, Setup will prompt you for information and display the status of the installation. The dialog is slightly different for new installations and for re-installations. For re-installations, you specify where the existing DataDB and TableDB are located. When setup starts, the version about to be installed is shown:



Figure 12-1. Setup Welcome Screen

For Windows 3.1 users in particular, it is important that all other programs be closed. Otherwise Setup will not be able to install newer versions of some Windows System files. If this happens an error message will be displayed. Your choices are to retry after you Alt-Tab to the other programs and close them, or to cancel the installation. The Microsoft Office Tool Bar is known to prevent installation under Windows 3.1.

Next, you are asked where you want the software to be located. If possible, use the suggested directory, C:\SRS4.

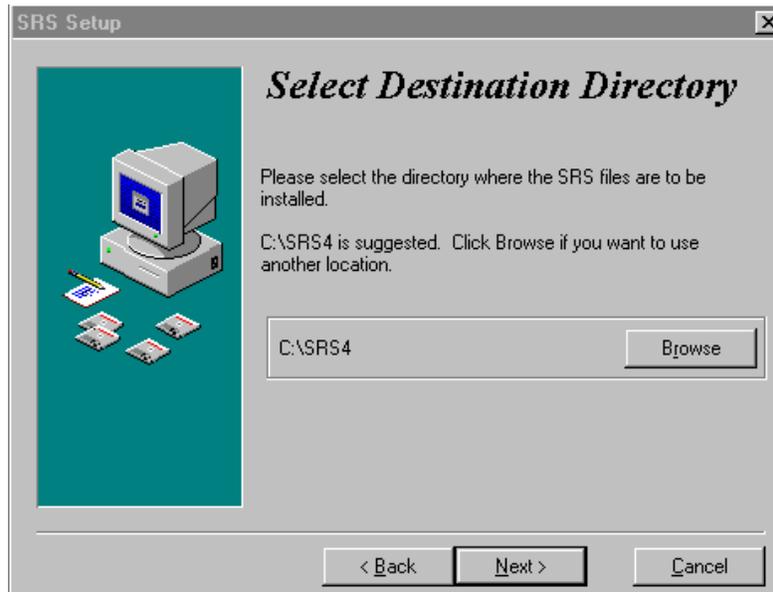


Figure 12-2. Supply Destination Location

Next, you are asked if this is a new installation or if the DataDB and TableDB databases exist from a prior installation.

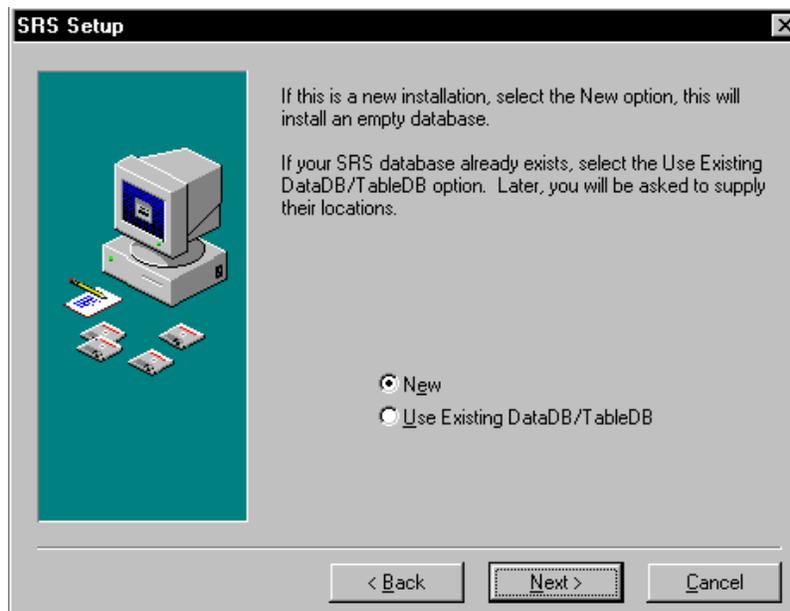


Figure 12-3. New or Existing Data

If you selected New Installation, but Setup found a DataDB, the following screen will appear. A similar screen will appear if you selected New Installation and Setup finds a TableDB. In either case your choices are to start over and select re-installation so the existing DataDB and TableDB will be retained, or to select Replace Existing. *If you select Replace Existing DataDB, the*

existing DataDB will be replaced with an empty one. If you select Replace Existing TableDB, the existing TableDB will be replaced with the default one.

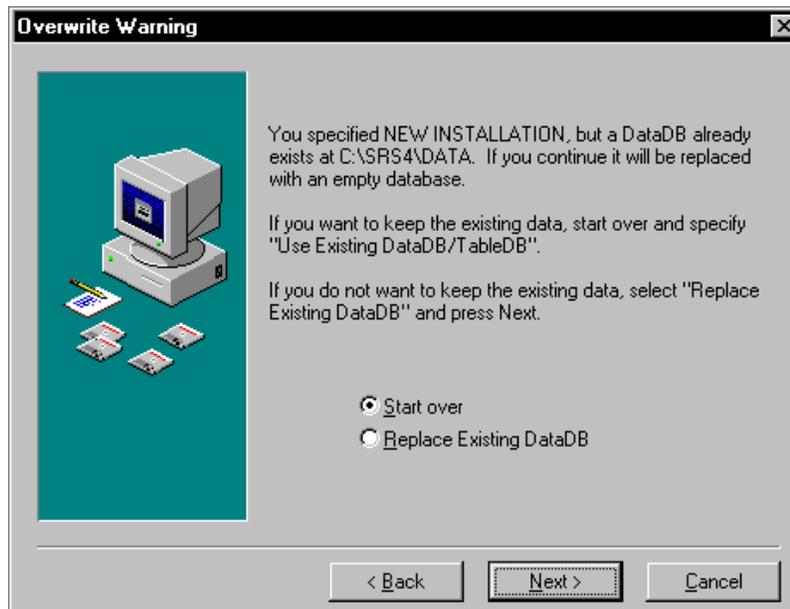


Figure 12-4. Overwrite Warning

If you selected Use Existing DataDB and TableDB, Setup will ask you for their locations. If they are not at the default locations, use Browse to specify their location. Separate screens will appear for DataDB and TableDB. Setup needs these locations in order to continue the installation.

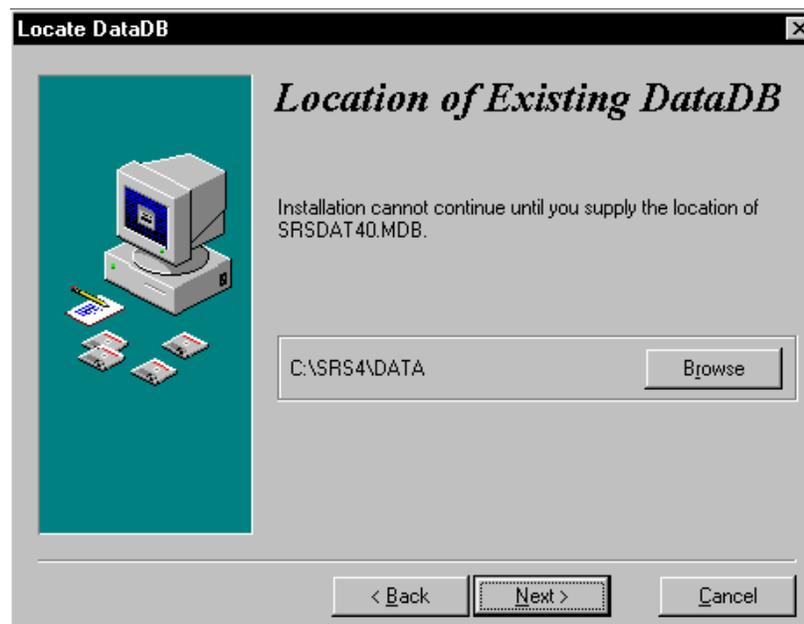


Figure 12-5. Location of Existing DataDB

Next, Setup requests the name of the Program Manager group. It is best to use the suggested name. If you are running Windows 95, Setup will place a short cut to the Program Group on your desktop. You may find this a faster way to access the program group. However, if you wish to remove it, wait for Setup to complete, then return to your desktop and right click on the short cut and select Delete.

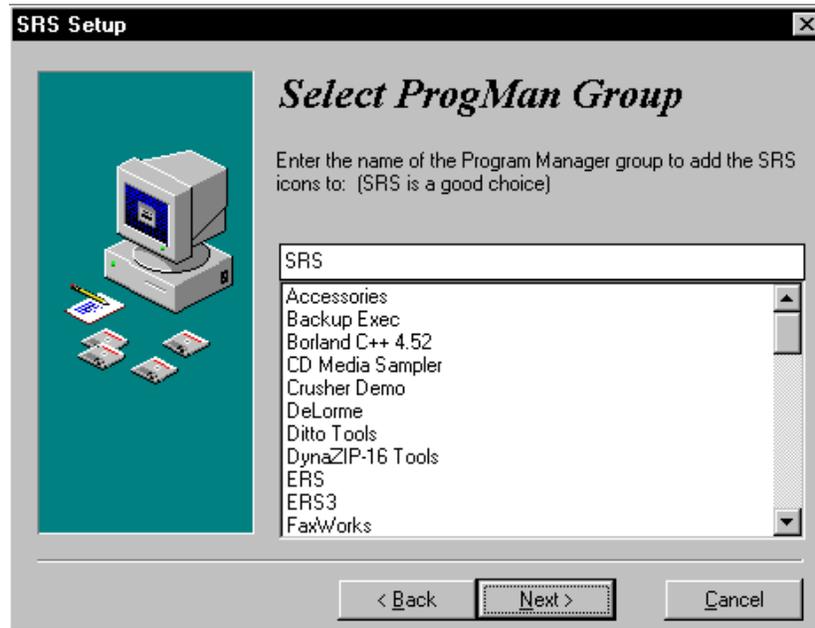


Figure 12-6. Name of Program Group

Once you have supplied all the information Setup needs to complete the installation, Setup displays the locations of the system (Application), the DataDB, and the TableDB. Setup also shows the database Action:

- New = New Installation
- Retained = Existing DataDB/TableDB was retained
- Replaced = Existing DataDB/TableDB was replaced.

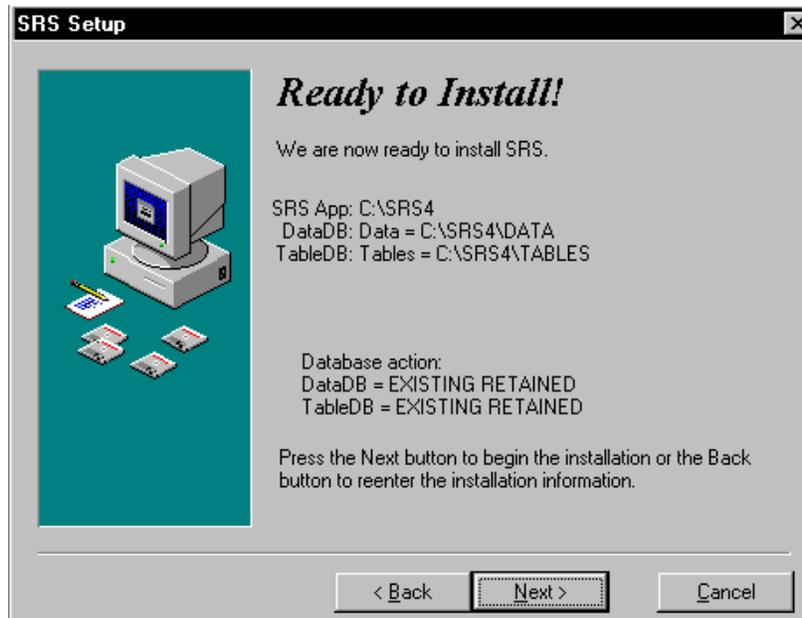


Figure 12-7. Ready to Install

When Setup has completed installation, the following screen will appear. Be sure to press Finish before removing the last diskette. Otherwise, you may get a Drive Not Ready error as Setup is closing itself.



Figure 12-8. Installation Complete

Problems with the Installation

If you encounter a faulty diskette, you will need to obtain a new set of installation diskettes. If your hard drive is full, you will need to delete some files or move them to another drive.

If you receive the “File in Use” error, cancel the installation, restart windows, close all programs and tool bars, and try again. If the problem persists, choose the Skip option. Use Skip as a last resort.

LAN Installation

The SRS application (SRSAPP40.MDB) should be on a local hard drive. The DataDB and TableDB may be on a file server. You may want to consult your network administrator before attempting a LAN installation.

Follow these steps to install SRS on the first workstation:

1. Run the SRS setup program on the workstation.
2. Run SRS on the workstation and create a DataDB and a TableDB on the server’s shared drive. (See Chapter 9.)
3. Enter some data then exit to Windows.

Now, follow these steps with the other workstations:

1. Install SRS on the other workstations. Select Use Existing DataDB/TableDB. (See Figure 12-3.)
2. Use Browse to locate the existing DataDB and TableDB. (See Figure 12-5.)
3. Run SRS on each workstation and confirm it is accessing the DataDB established by the first workstation.

It’s a good idea to place SYSTEM.MDA on the file server so all workstations accessing the database will be working from the same set of user IDs and passwords. With this approach, any user can access the data from any workstation using his/her ID and password. If, instead, local SYSTEM.MDAs are used, each workstation will have its unique set of user IDs and passwords. Then, a user may have a different password when working at a different workstation. To use a common SYSTEM.MDA, copy it to the file server and configure each workstation to use it:

1. Copy the SYSTEM.MDA from the local SRS4 directory to a shared directory on the server. You may wish to name this directory SRS_SYS.
2. Use NOTEPAD to edit SRS.INI (which is in the SRS4 directory) for each workstation. Find the line beginning SystemDB= in the [Options] section and change it to reference the SYSTEM.MDA on the server.
3. Run SRS on each workstation to confirm it can access the DataDB and TableDB on the server, and that user IDs established on one workstation are available on the others.

The system runs on the following LANs:

- Microsoft LAN Manager
- Microsoft Windows for Workgroups
- Windows 95 Network
- Microsoft Windows NT
- Novell Netware
- Lantastic

Running SRS on a LAN

Any number of LAN users may be accessing the same SRS database (SRSDAT40.MDB) at the same time. If two users attempt to update the same record at the same time, one will be locked out until the other finishes.

An *optimistic locking strategy* is used. This is the most efficient strategy when only a few users will be using the system at once and the environment is cooperative.

With this strategy, you may receive an error message that your changes cannot be saved because someone else made changes while you were in the middle of making yours. Do not copy the data to the clipboard. Instead, cancel your changes, wait a few seconds and access the record again. Review the changes made by the other user and then re-enter your changes.

In keeping with the “cooperative environment” assumption, the system does not lock out other users during some critical operations. For example, if you import summary data from a unit while another user is preparing summary reports, it is likely the import will fail or the other user will encounter problems.

Important Files

The SRS Setup utility will store a number of files in the SRS4 directory. Also, a number of files are placed in your WINDOWS\SYSTEM directory unless they are already present.

The following files are important and you may need to know their location:

SRSAAPP40.MDB - This is the SRS Application database. It is located in the SRS4 directory. It contains the system’s screens, reports, and code.

SRSDAT40.MDB - This file contains the summary data for adults, youth, staff, recalls, etc. It is the **DataDB**. More than one DataDB may be on a computer.

SRSTBL40.MDB - This file contains the race codes, foods database and other tables. It is the **TableDB**. More than one TableDB may be on a computer.

SYSTEM.MDA - This is a Microsoft Access file. It contains user names, passwords and related information.

SRS.INI - This is the Windows initialization file for SRS. It is located in the SRS4 directory. In addition to information required by Microsoft Access, this file contains the location of the DataDBs and TableDBs. Use NOTEPAD to view or revise SRS.INI. Revise it with caution as the system may not run if this file becomes damaged.

MSARN200.EXE - This is the Microsoft Access program that ‘runs’ SRSAAPP40.MDB.

LDB files - For each MDB file there is an associated LDB file. This file contains locking information. On rare occasions, this file may not be closed correctly by Microsoft Access. When this happens, simply confirm no one, including you, is accessing the associated MDB, then delete the faulty LDB. Microsoft Access will recreate it the next time the MDB is used.

Index

- A**
- Adult, 4, 21, 28, 35, 57
- B**
- Backup, 62, 63
Behavior Checklist, 4, 11, 21, 29, 30, 31, 35, 55, 57
- C**
- Compact, 61
- D**
- DataDB, 4, 10, 47, 48, 49, 50, 51, 52, 53, 62, 67, 68, 69, 70, 71, 73, 74
dBase, 59, 61
- E**
- Export, 11, 30, 36, 56, 58
- F**
- Filters, 35, 36
Foods Database, 10, 43, 44, 45, 46, 59
- I**
- Import, 11, 21, 22, 23, 27, 30, 36, 57, 59
Installation, 3, 7, 67, 69, 71, 72
Interagency Cooperation, 4, 58
- L**
- Labels, 16
LAN, 5, 67, 73
- Local Area Network. *See* LAN, 73
- N**
- Network. *See* LAN, 73
Nutrition, 1, 30
- P**
- Pack. *See* Repair or Compact
Perinatal, 4, 5, 21, 35, 57
- Q**
- Query. *See* Filters
Question Sets, 11, 12, 29, 30, 31, 56
- R**
- Race Code, 4, 10, 11, 12, 41, 42, 59
Repair, 61
Restore, 62, 63
- S**
- Setup, 8, 68, 69, 70, 71, 72, 74
Software Update, 64
Staff, 4, 5, 21
Subgroups, 5, 11, 35, 36
- T**
- TableDB, 4, 10, 47, 48, 49, 51, 52, 62, 67, 68, 69, 70, 71, 73, 74
Tools, 3, 5, 7, 9, 48, 54, 61
- Y**
- Youth, 4, 21